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Public Attitudes to Active Travel 2022

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Public Attitudes to Active Travel 2022

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Views expressed in this report are those of the researcher and not necessarily those of the Welsh Government

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Glossary

Key word	Definition
Active Travel	<p>Active Travel is defined as purposeful journeys undertaken by cycling, walking, or running. Active Travel includes journeys to work, education, or to access services.</p> <p>Walking also includes the use of wheelchairs and mobility scooters. References to bikes includes other types of cycles, such as tricycles or handcycles.</p> <p>Cycling, walking, or running for leisure and exercise do not count as forms of Active Travel.</p>
Social Grade	<p>Social grade is a classification system based on occupation developed for use on the National Readership Survey (NRS).</p> <p>Social grades are defined as follows:</p> <p>AB: Higher and intermediate managerial, administrative and professional occupations</p> <p>C1: Supervisory, clerical and junior managerial, administrative and professional occupations</p> <p>C2: Skilled manual workers</p> <p>DE: Semi-skilled and unskilled manual workers, state pensioners, casual and lowest grade workers, unemployed with state benefits only</p>
Quota Controls	<p>Quota controls are target numbers of interviews set for specific demographic groups within the population to help achieve a representative sample for the survey.</p> <p>Interlocking demographic quota controls means that the</p>

	target incorporates two variables: age group within gender.
Region	<p>The regions referred to in this report consist of unitary authorities. The five different regions consist of the following unitary authorities:</p> <p>North Wales: Wrexham, Flintshire, Denbighshire, Conwy, Anglesey, Gwynedd.</p> <p>Mid/West Wales: Powys, Ceredigion, Carmarthenshire, Pembrokeshire.</p> <p>West South Wales: Swansea, Neath & Port Talbot, Bridgend.</p> <p>Valleys: Rhondda Cynon Taf, Merthyr Tydfil, Caerphilly, Blaenau Gwent.</p> <p>Cardiff & S.E. Wales: Cardiff, Vale of Glamorgan, Torfaen, Monmouthshire, Newport.</p>

1. Introduction

- 1.1 The aim of the Active Travel (Wales) Act 2013 is ‘to make walking and cycling the most natural and normal way of getting about.’¹
- 1.2 The Active Travel Act requires local authorities to continuously improve infrastructure for cyclists and pedestrians. The Act also requires new road schemes to account for the needs of cyclists and pedestrians at the design stage.
- 1.3 Active travel is a key component of the Llwybr Newydd: Wales Transport Strategy 2021. The Strategy sets out various targets relating to active travel. These targets include developing facilities for cyclists and pedestrians, encouraging all schools to have an active travel plan, and working with partners to promote behaviour change and thereby encourage cycling and walking.²
- 1.4 In addition, the Welsh Government has set a carbon net zero target for 2050. The promotion of active travel at the expense of private car use will help Wales to realise this target.
- 1.5 Active travel is relevant to the Well-Being of Future Generations (Wales) Act 2015. Encouraging and enabling more people to cycle, walk, and run more will promote active, inclusive, and safer forms of travel in accordance with the Act’s well-being goals of creating a more equal and healthier Wales.³
- 1.6 The Active Travel Act requires a statutory review no later than five years after its implementation and periodically thereafter. The purpose of the review is to ‘assess its success in securing active travel routes and related facilities and improvements of existing active travel routes and related facilities.’⁴ The review should also assess progress in encouraging more people to walk and cycle more often and the lessons learnt during the delivery of the legislation.⁵

¹ [Active Travel \(Wales\) Bill: Explanatory Guidance](#), p. 9.

² [Llwybr Newydd: The Wales Transport Strategy 2021](#), chapter 7.1.

³ [Well-being of Future Generations \(Wales\) Act 2015: The Essentials](#)

⁴ [Active Travel \(Wales\) Act 2013](#), p. 7.

⁵ [Active Travel Act Guidance, July 2021](#), p. 26.

- 1.7 To support the statutory review, Welsh Government commissioned the inclusion of survey questions in the Wales Omnibus survey run by Beaufort Research to understand respondents' current and prior travel behaviours. This included questions about incentives and barriers to active travel for respondents.
- 1.8 The survey was conducted via the June 2022 wave of the Wales Omnibus (6-26 June 2022). The questions that were included in the survey can be found in Annex B to this report.

2. Methodology

- 2.1 This research was conducted through the Beaufort Research Wales Omnibus survey which interviews a quota sample of 1,000 adults (aged 16 and over) from across Wales.
- 2.2 A different set of adults are interviewed each wave, but samples are matched in terms of key demographic characteristics.
- 2.3 The results have been tabulated according to individual demographic categories (age, region, ethnicity, social grade, etc). Since respondents fit into more than one demographic category, this means respondents' answers to individual questions may be represented more than once in this report.
- 2.4 Moreover, the use of proportional quota sampling and weighted data to reflect key demographics within the Welsh population means that the findings reflect the view of the sample, rather than the view of the wider population in Wales.
- 2.5 This report makes use of the weighted data to analyse respondents' use and views of active travel. For some demographic categories the weighted data does not sum to 1,000. This could be because some respondents may have failed or refused to complete the relevant sections of the survey.
- 2.6 It should also be noted that the use of arithmetical rounding to whole numbers means some columns do not sum to 100 per cent. In other cases, the use of arithmetical rounding means there are discrepancies between the results of particular questions when expressed as a number and the results of the same questions when expressed as a percentage.
- 2.7 Where respondents could give more than one response, the sum total may exceed 100 per cent.
- 2.8 Full data tabulations and the unweighted data from the survey have been provided to the Welsh Government in separate technical reports compiled by Beaufort Research.
- 2.9 Fieldwork for the June 2022 survey took place between 6 and 26 June 2022. A total of 1,000 interviews were completed and analysed.

- 2.10 Draft questions were provided by the Welsh Government's Active Travel Team. These were finalised following discussions with Beaufort Research (see Annex B).
- 2.11 Most survey questions were wholly closed questions. In other words, participants were given a set of response options to choose from. For some questions, a single response was required. For other questions, multiple responses could be chosen.

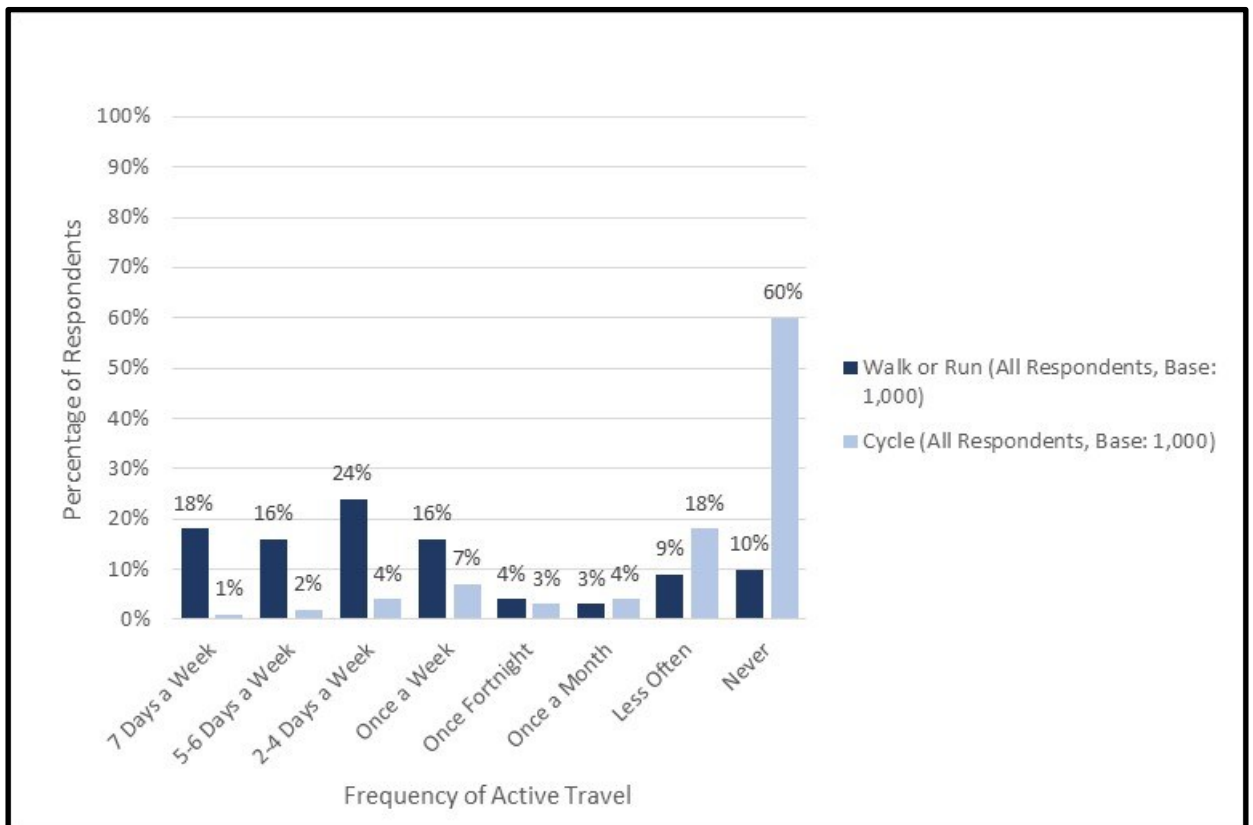
3. Findings

What modes of active travel are used according to demographic group?

Walking and Running

3.1 In June 2022, 74 per cent of all respondents walked or ran as a form of travel at least once a week (734 out of 1,000 respondents). Thirty-four per cent of all respondents walked or ran as a form of travel between 5 and 7 times a week (336 out of 1,000 respondents).

Figure 3.1 Rates of Active Travel



3.2 There were generational differences when it came to walking and running frequency amongst respondents. Eighty per cent of respondents aged 16 to 34 walked or ran at least once a week (233 out of 296 respondents). This figure includes 44 per cent of respondents aged 16 to 34 who walked or ran between 5 and 7 days per week (127 out of 293 respondents).

- 3.3 Among respondents aged 55 and over respondents, 69 per cent walked or ran at least once a week (265 out of 381 respondents). This figure includes 25 per cent of respondents aged 55 and over who walked or ran between 5 and 7 days per week (96 out of 381 respondents).
- 3.4 Seventy-two per cent of female respondents walked or ran at least once a week (367 out of 509 respondents), with 34 per cent of female respondents walking or running between 5 and 7 days per week (172 out of 509 respondents). The figures were comparable for male respondents. Seventy-six per cent of male respondents walked or ran at least once a week (364 out of 486 respondents), and 34 per cent walked or ran between 5 and 7 days a week (162 out of 486 respondents).
- 3.5 A greater percentage of respondents in North Wales (81 per cent/180 out of 223 respondents) and Cardiff and South East Wales (78 per cent/202 out of 260 respondents) walked or ran at least once a week in comparison with other regions. For West South Wales, Mid/West Wales, and the Valleys the corresponding figures were 71 per cent, 66 per cent, and 69 per cent.

Table 3.1 Rates of Walking and Running According to Age⁶

Age	16-34	35-54	55+
Weighted Base (Total = 1,000).	293	326	381
7 Days a Week	24%	19%	13%
5-6 Days a Week	20%	15%	12%
2-4 Days a Week	24%	22%	26%
Once a Week	12%	16%	18%
Once Fortnight	6%	3%	3%
Once a Month	3%	3%	2%
Less Often	7%	12%	9%
Never	5%	9%	16%

⁶ Figures may not sum to 100 owing to rounding.

Cycling

3.6 Rates of cycling were lower when compared with running and walking. Only 14 per cent of all respondents cycled at least once week (136 out of 1,000 respondents). Sixty per cent of respondents reported that they never cycled (603 out of 1,000 respondents). The percentage of respondents who stated that they never cycled was greatest amongst respondents aged 65 and over (85 per cent) and female respondents (71 per cent).⁷

Table 3.2 Rates of Cycling by Age⁸

Age	16-34	35-54	55+
Weighted Base	293	326	381
7 Days a Week	2%	1%	0%
5-6 Days a Week	3%	4%	0%
2-4 Days a Week	6%	5%	2%
Once a Week	8%	8%	4%
Once Fortnight	6%	4%	1%
Once a Month	7%	5%	1%
Less Often	24%	21%	12%
Never	44%	53%	79%

3.7 Nineteen per cent of respondents aged 16 to 34 and 18 per cent of respondents aged 35 to 54 cycled at least once a week (54 out of 293 and 57 out of 326 respondents respectively). For those aged 55 and over, the figure is much lower. Only 6 per cent of respondents in this category cycled at least once a week.

3.8 In percentage terms, more male respondents (21 per cent) cycled at least once a week in comparison with female respondents (7 per cent).⁹

3.9 Rates of cycling were comparable across regions. Fifteen per cent of respondents in North Wales cycled at least once a week (34 out of 223 respondents). This compared with 14 per cent of respondents in Cardiff and

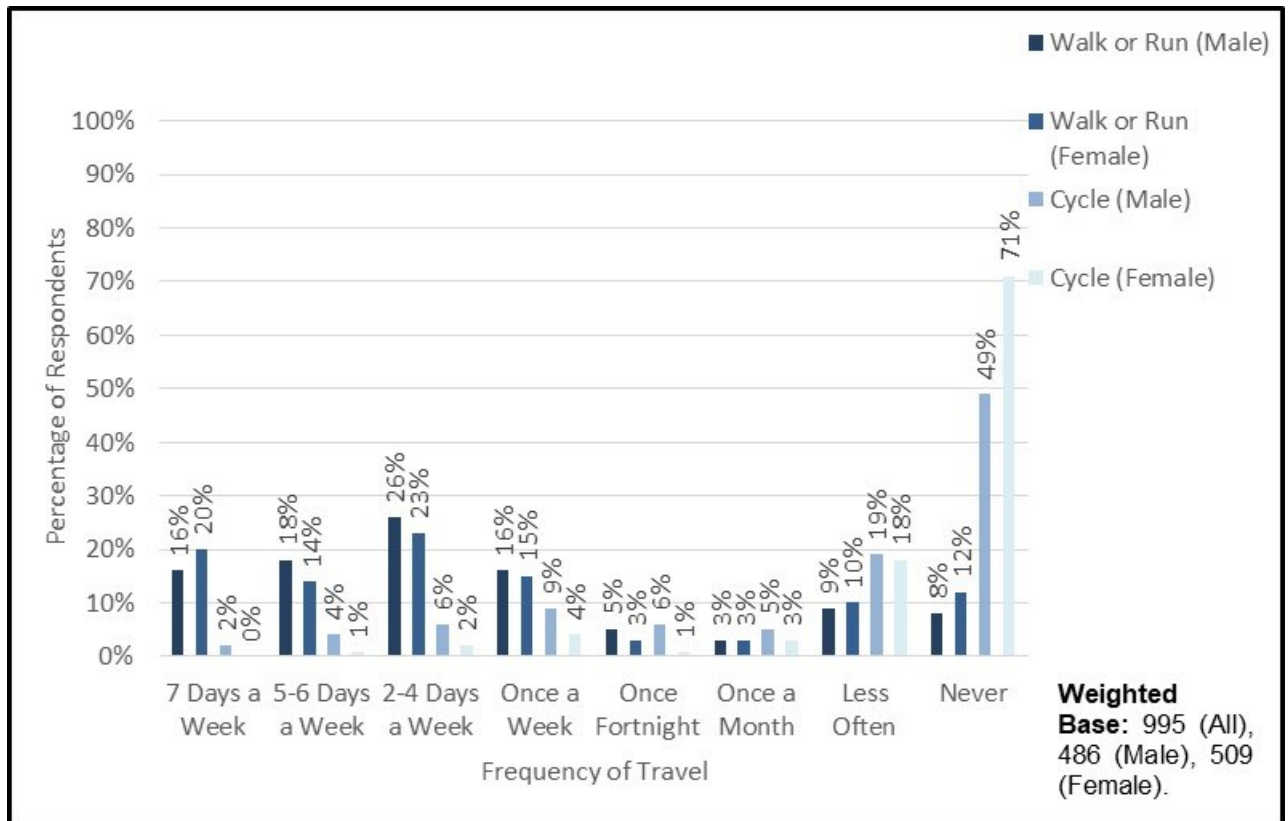
⁷ The respective figures for respondents aged 65 and over and female respondents were 159 and 362 out of 1,000.

⁸ Figures may not sum to 100 owing to rounding.

⁹ The respective weighted figures for male and female respondents were 103 out of 486 respondents and 34 out of 509 respondents.

South East Wales (37 out of 260 respondents) and 13 per cent of respondents for each of the regions of Mid/West Wales, the Valleys, and West South Wales.¹⁰

Figure 3.2 Rates of Active Travel According to Gender

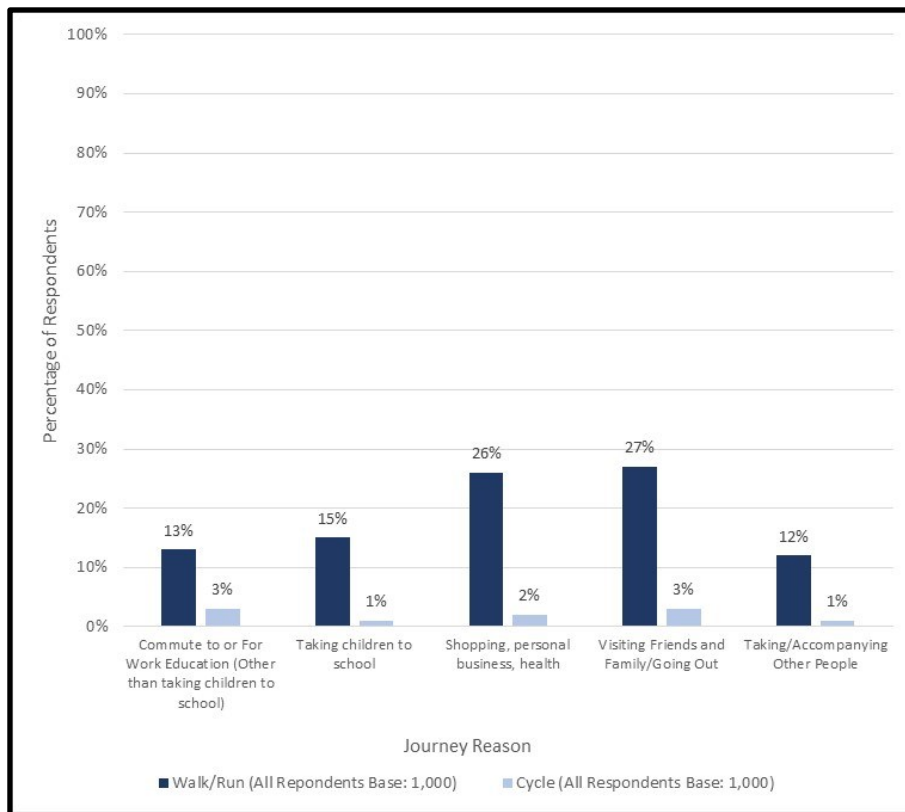


Journey Reasons

- 3.10 Low numbers of respondents cycled across journey purposes (3 per cent of all respondents cycled to work or education; 2 per cent of all respondents cycled to go shopping, undertake health-related journeys, and for personal business reasons (e.g. to go to the hairdressers); and 3 per cent of all respondents cycled to visit friends and family).
- 3.11 When compared to cycling, a greater percentage of respondents walked or ran for the same journey purposes. The most popular journey purpose was walking or running to visit friends and family (27%). The second least popular journey by walking or running was commuting to work or education (13%).

¹⁰ For Mid/West Wales, the Valleys, and West South Wales the respective weighted figures were 22 out of 173, 21 out of 168, and 22 out of 175 respondents.

Figure 3.3 Active Travel According to Journey Purpose



How have Active Travel choices changed?

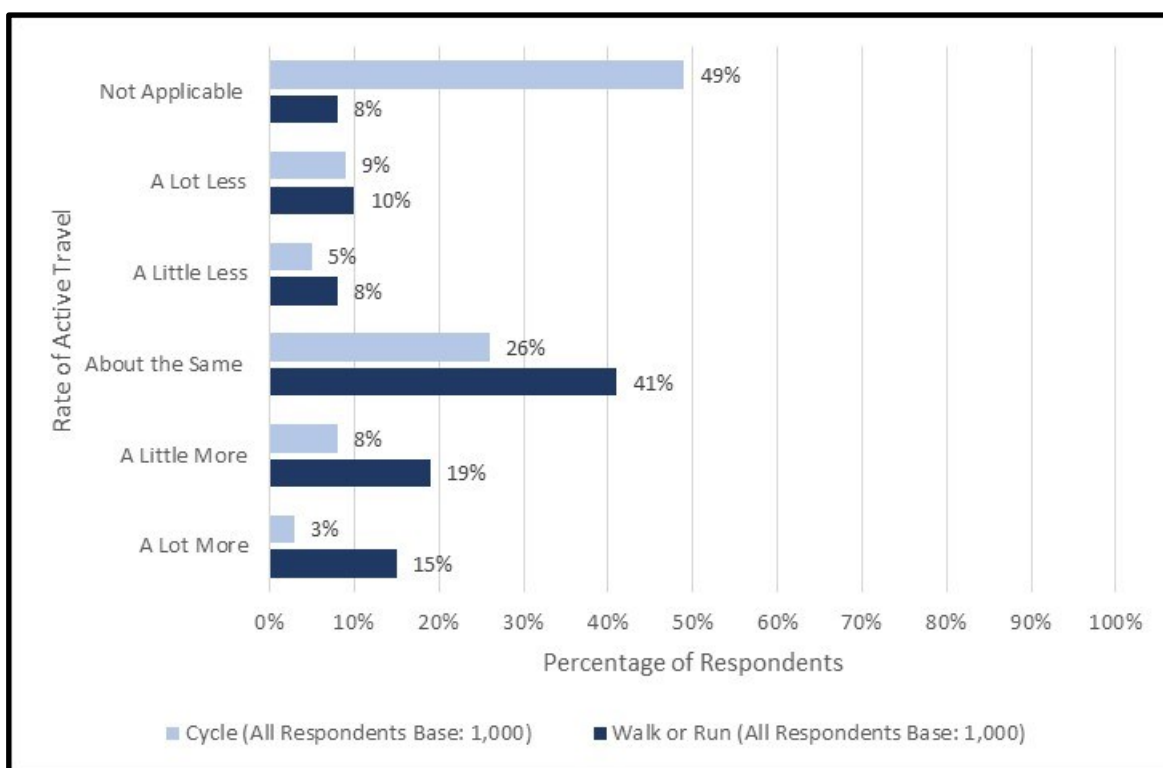
3.12 For each mode of travel, respondents were asked if they were travelling either more or less in June 2022 when compared with three years previously. Respondents' answers were based on their own self-reporting rather than analysis of data over the three-year period.

3.13 Overall, more respondents reported that they were walking and running (41 per cent) or cycling (26 per cent) 'about the same' when compared with those respondents who stated that they were undertaking either more or less active travel journeys by these respective modes.

Walking

3.14 In terms of modes of active travel, 34 per cent of all respondents reported that they were walking or running more in June 2022 when compared with three years previously.

Figure 3.4 Rates of Active Travel in June 2022 in Comparison with Three Years Previously



- 3.15 In percentage terms, more respondents aged 16 to 34 (45 per cent) recorded that they were walking or running more when compared with those aged 35 and over (28%).¹¹
- 3.16 Female respondents (36 per cent) were walking or running more in percentage terms when compared with male respondents (31 per cent).¹²
- 3.17 Regionally, a greater percentage of respondents from West South Wales (28 per cent) were walking or running less when compared with respondents from other regions. North Wales recorded the smallest decrease (11 per cent) followed by Cardiff and South East Wales (16 per cent), Mid/West Wales (18 per cent), and the Valleys (21 per cent).¹³

¹¹ The respective figures were 133 out of 293 for respondents aged 16 to 34 and 203 out of 707 for respondents aged 35 and over.

¹² The respective figures for male and female respondents were 151 out of 486 respondents and 183 out of 509 respondents.

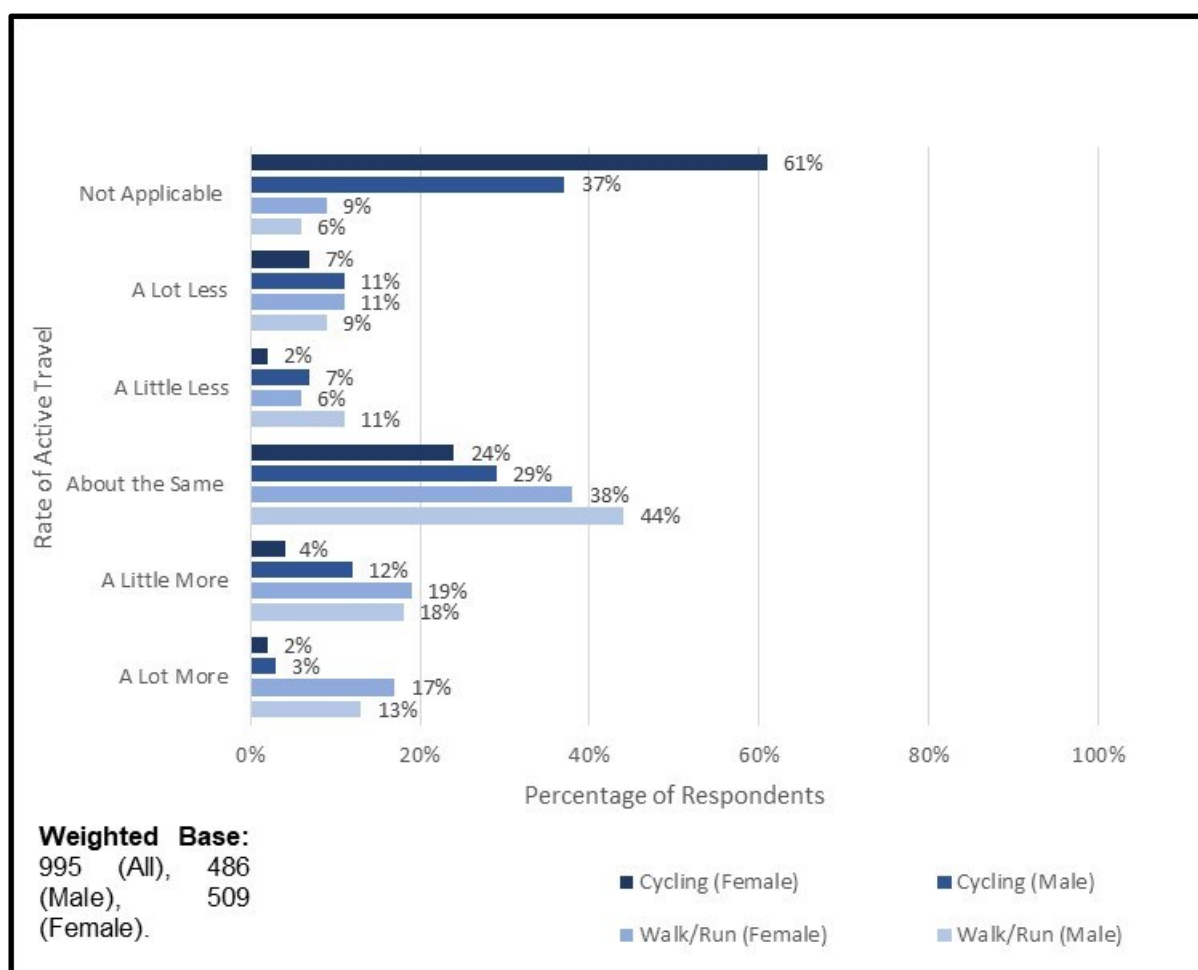
¹³ The respective figures for West South Wales, North Wales, Cardiff and South East Wales, Mid/West Wales and the Valleys were 47 out of 168, 24 out of 223, 41 out of 260, 32 out of 173, and 36 out of 175 respondents.

Table 3.3 Rates of Active Travel by Region¹⁴

Region	North Wales	Mid/West Wales	West South Wales	The Valleys	Cardiff and South East Wales
Weighted Base (Total – 1,000)	223	173	168	175	260
A Lot More	16%	13%	13%	11%	19%
A Little More	20%	17%	17%	22%	18%
About the Same	46%	40%	36%	42%	38%
A Little Less	7%	7%	11%	7%	9%
A Lot Less	4%	11%	17%	14%	7%
Not Applicable	7%	12%	6%	5%	8%

¹⁴ Figures may not sum to 100 owing to rounding.

Figure 3.5 More or Less Active Travel According to Gender



Cycling

- 3.18 In June 2022, 11 per cent of all respondents reported that they were cycling more in comparison with three years previously, whilst 14 per cent were cycling less.
- 3.19 Nearly half of all respondents (49 per cent) described cycling as ‘not applicable’ because they had not used this mode of travel for at least three years.
- 3.20 For each age category, more respondents reported that they were cycling less than they were than they were three years previously when compared with respondents who reported that they were cycling more. For example, 18 per cent of respondents aged 16 to 34 (51 out of 293 respondents) reported that they were cycling more in comparison with 23 per cent of respondents in the same age category (68 out of 293 respondents) who stated that they were cycling less.

3.21 Declines were also recorded for male and female respondents (18 and 9 per cent respectively).¹⁵

Why have active travel arrangements changed?

3.22 Respondents who reported that they were travelling either more or less by any mode in June 2022 were asked to give a reason for the change in their travel behaviours.¹⁶ The survey data does not specify how travel arrangements changed according to specific modes of travel.

3.23 COVID-19 was the principal determinant of changes to respondents' travel arrangements.¹⁷ Thirty-one per cent of all respondents reported that their work or education circumstances had changed because of COVID-19, and this had impacted their travel arrangements.

3.24 After COVID-19's impact on respondents' work or education circumstances, changes to respondents' health (24 per cent) and family circumstances (22 per cent) were cited as the next two principal factors impacting their travel arrangements.

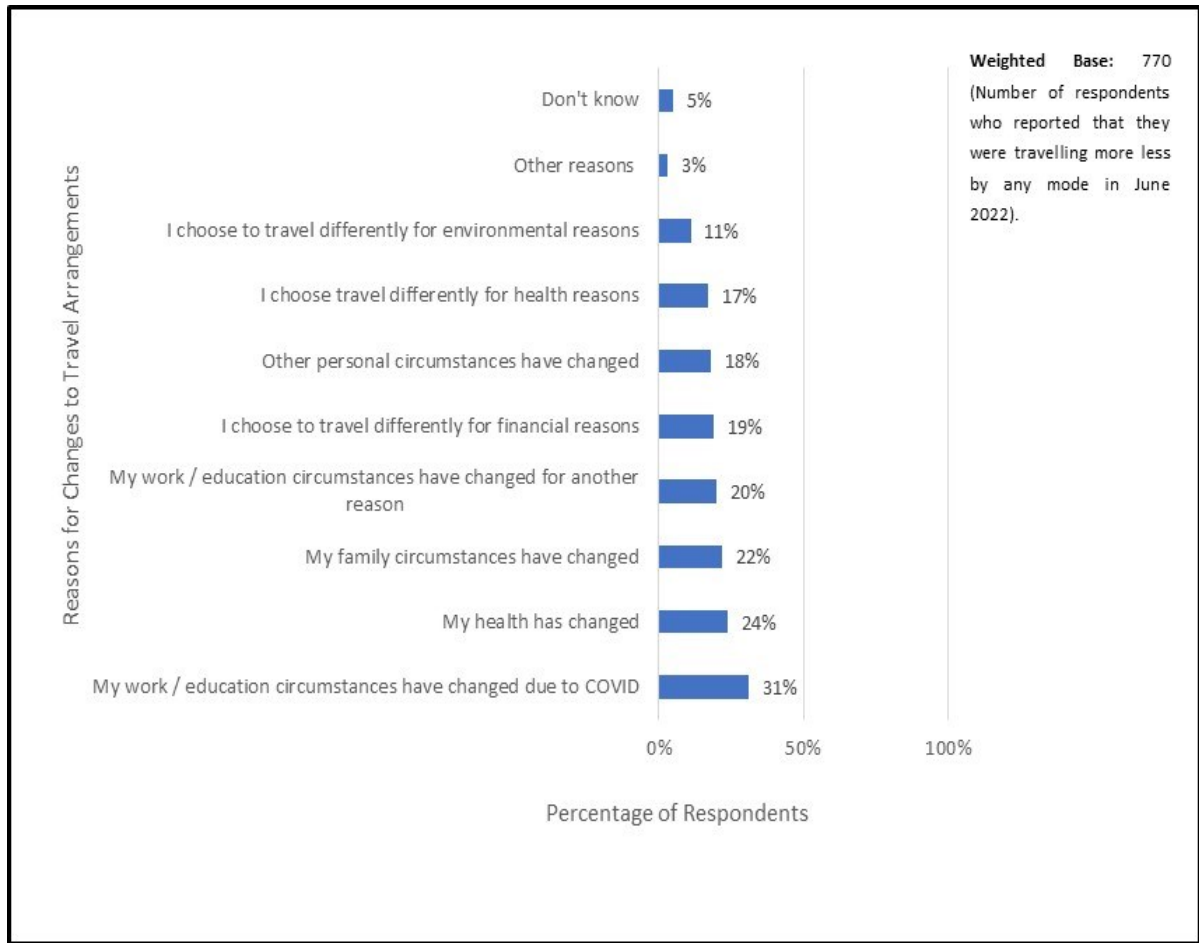
3.25 Other choices, such as environmental (11 per cent) or health reasons (17 per cent), were cited by fewer respondents as reasons for changes to their travel arrangements.

¹⁵ The respective figures for male and female respondents were 89 out of 486 respondents (male) and 47 out of 509 respondents (female).

¹⁶ The following data is based on a weighted sample of 770 respondents who reported that they were travelling more or less by any mode in June 2022 when compared with three years previous. Respondents could give more than one reason for changes to their travel arrangements which means the sum of the responses is greater than 100 per cent.

¹⁷ The survey does not specify what is meant by the impact of COVID-19 on respondents' travel arrangement.

Figure 3.6 Reasons for Changes to Respondents' Travel Arrangements



3.26 In comparison with respondents in social grades C2DE (21 per cent), a greater percentage of respondents in social grades ABC1 (41 per cent) reported that they travelled either more or less by specific modes because their work and education arrangements had been impacted by COVID-19.¹⁸

¹⁸ The respective figures for respondents in social grades ABC1 and C2DE were 162 out of 396 (ABC1) and 79 out of 375 (C2DE).

Table 3.4 Reasons for Changes to Respondents' Travel Arrangements According to Age¹⁹

Age	16-24	25-34	35-44	45-54	55-64	65+
Weighted Base (Total = 770).	110	150	175	70	135	130
My work / education circumstances have changed due to COVID-19	44%	36%	37%	36%	24%	12%
My health has changed	20%	15%	21%	27%	37%	28%
My family circumstances have changed	20%	32%	25%	22%	17%	12%
My work / education circumstances have changed for another reason	29%	22%	23%	19%	14%	12%
I choose to travel differently for financial reasons	20%	20%	19%	13%	25%	15%
Other personal circumstances have changed	20%	16%	15%	6%	24%	21%
I choose to travel differently for health reasons	10%	17%	15%	18%	17%	25%
I choose to travel differently for environmental reasons	7%	14%	8%	10%	13%	15%
Other reasons (please specify:	0%	3%	4%	1%	0%	6%
Don't know	5%	2%	5%	3%	3%	14%

- 3.27 A greater percentage of female respondents (27 per cent) reported that changes to their family circumstances had impacted their travel arrangements in comparison with male respondents (16 per cent).²⁰
- 3.28 A greater percentage of over 65s reported that they opted to change their travel arrangements for health (25 per cent) and environmental (15 per cent) reasons when compared with respondents in younger age groups (32 and 19 out of 130 respondents respectively). Among respondents aged 16 to 24, 10 per cent reported that they travelled differently for health reasons, and only 7 per cent

¹⁹ Figures do not sum to 100 per cent because this data is derived from a multiple-choice question.

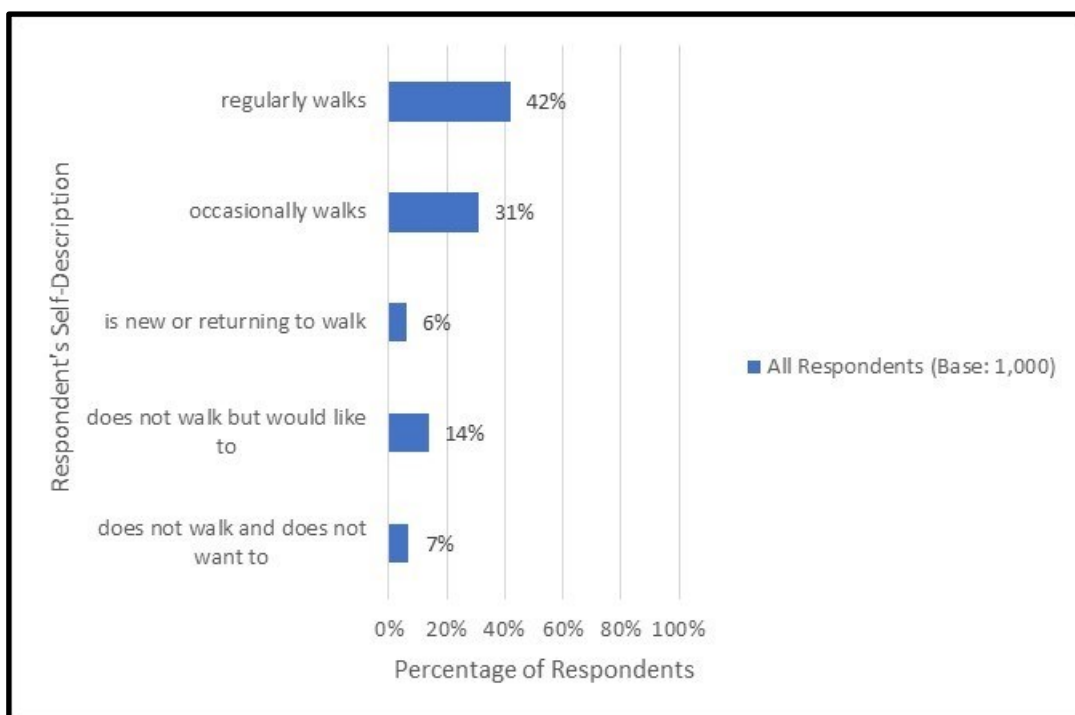
²⁰ The respective figures for male and female respondents were 62 out of 377 (male) and 105 out of 389 (female).

stated that they travelled differently for environmental reasons (11 and 7 out of 110 respondents respectively).

Respondents' Self-Reporting of Active Travel

3.29 Respondents were asked to describe themselves in relation to active travel journeys.

Figure 3.7 Respondents' Self-Description Regarding Walking as a Form Active Travel



3.30 Approximately four out of ten of all respondents (42 per cent) stated they were someone who 'walks regularly' for journeys to a specific destination or to a public transport connection. Fourteen per cent of all respondents stated that they were someone who 'does not walk but would like to'. Only 7 per cent of all respondents stated that they were someone 'who does not walk and does not want to'.

3.31 Age does not appear to have impacted respondents' self-description regarding walking. For example, 44 per cent of respondents aged 16 to 24 described

themselves as someone who walks regularly in comparison with 46 per cent of respondents aged 65 and over who described themselves in the same terms.²¹

3.32 When compared with male respondents (9 per cent), in percentage terms twice as many female respondents (18 per cent) described themselves as someone who 'does not walk but would like to'.²² Conversely, twice as many male respondents (10 per cent) described themselves as someone 'who does not walk and does not want to' in comparison with female respondents (5 per cent).²³

3.33 Regionally, only 29 per cent of respondents in West South Wales described themselves as someone who walks regularly in comparison with an average of 45 per cent of respondents from the other regions who described themselves in the same terms.

Cycling

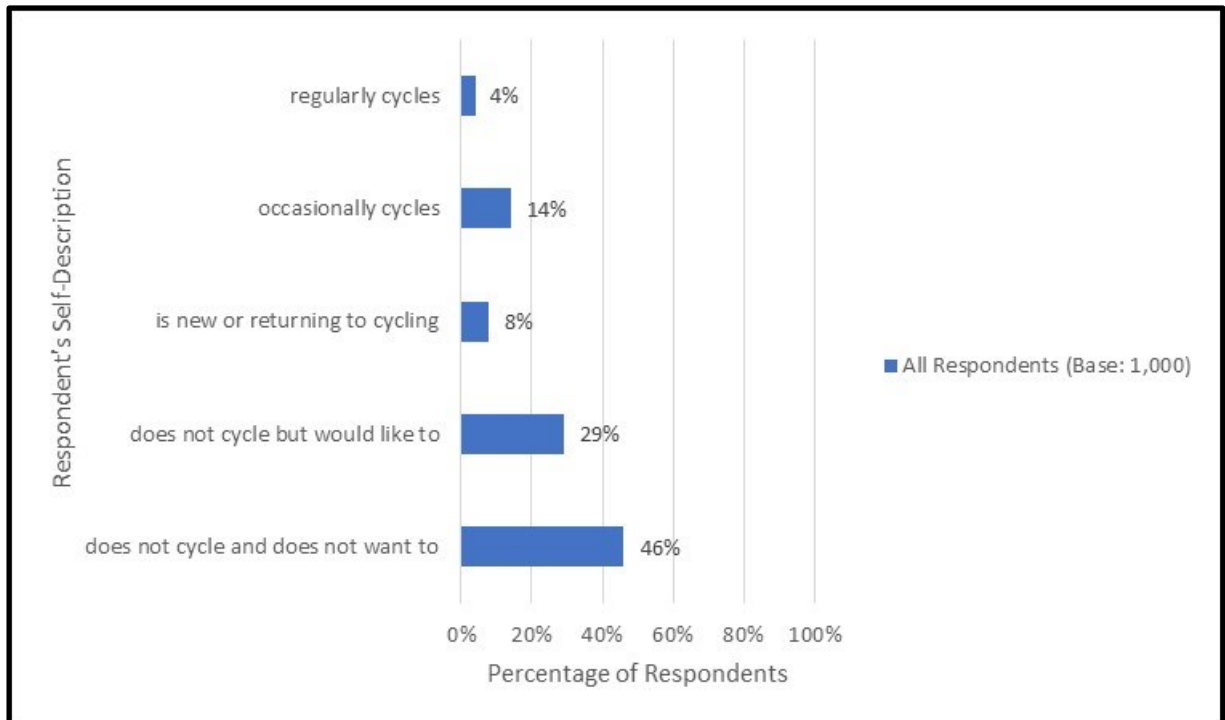
3.34 Fewer respondents described themselves as someone who cycles to a specific destination or to a public transport connection. Less than one in ten respondents (4 per cent) described themselves as someone who 'regularly cycles'. In contrast, 46 per cent of respondents described themselves as 'someone who does not cycle, and does not want to.' That said, approximately three in ten respondents (29 per cent) described themselves as someone who 'does not cycle, but would like to.'

²¹ The respective figures for respondents in these age categories are 53 out of 119 (respondents aged 16 to 24) and 87 out of 188 (respondents aged 65 and over).

²² The respective figures for male and female respondents were 91 out of 509 (male) and 45 out of 486 (female).

²³ The respective figures for male and female respondents were 47 out of 486 (male) and 27 out of 509 (female).

Figure 3.8 Respondents' Self-Description Regarding Cycling as a Form of Active Travel



- 3.35 There were generational differences when it came to respondents' self-description regarding cycling. Only 1 per cent of respondents aged 55 and over described themselves as 'regular' cyclists (three out of 381 respondents). Sixty per cent of respondents aged 55 and over described themselves as someone who 'does not cycle and does not want to cycle' (227 out of 381 respondents). This figure rises to 70 per cent for those respondents aged 65 and over (131 out of 188 respondents).
- 3.36 The response of younger participants was more mixed. Thirty-three per cent of respondents aged 16 to 24 described themselves as someone 'who does not cycle, but would like to' (39 out of 113 respondents). Twenty-four per cent of respondents in this category described themselves as someone who 'occasionally cycles' (29 out of 113 respondents).
- 3.37 Thirty-four per cent of respondents aged 16 to 34 described themselves as someone who 'does not cycle and does not want to cycle' (99 out of 293 respondents). In percentage terms, this is almost half the number of respondents

aged 55 and over who described themselves in the same terms (60 per cent, or 227 out of 381 respondents).

3.38 There were some notable differences among male and female respondents. In comparison with male respondents, a greater percentage of female respondents (53 per cent) described themselves as someone who ‘does not cycle and does not want to’. Thirty-eight per cent of male respondents placed themselves in this category.²⁴ In percentage terms, three times as many male respondents (6 per cent) described themselves as someone who regularly cycles in comparison with female respondents (2 per cent).²⁵

Table 3.5 Respondents’ Self-Description Regarding Cycling and Active Travel According to Age²⁶

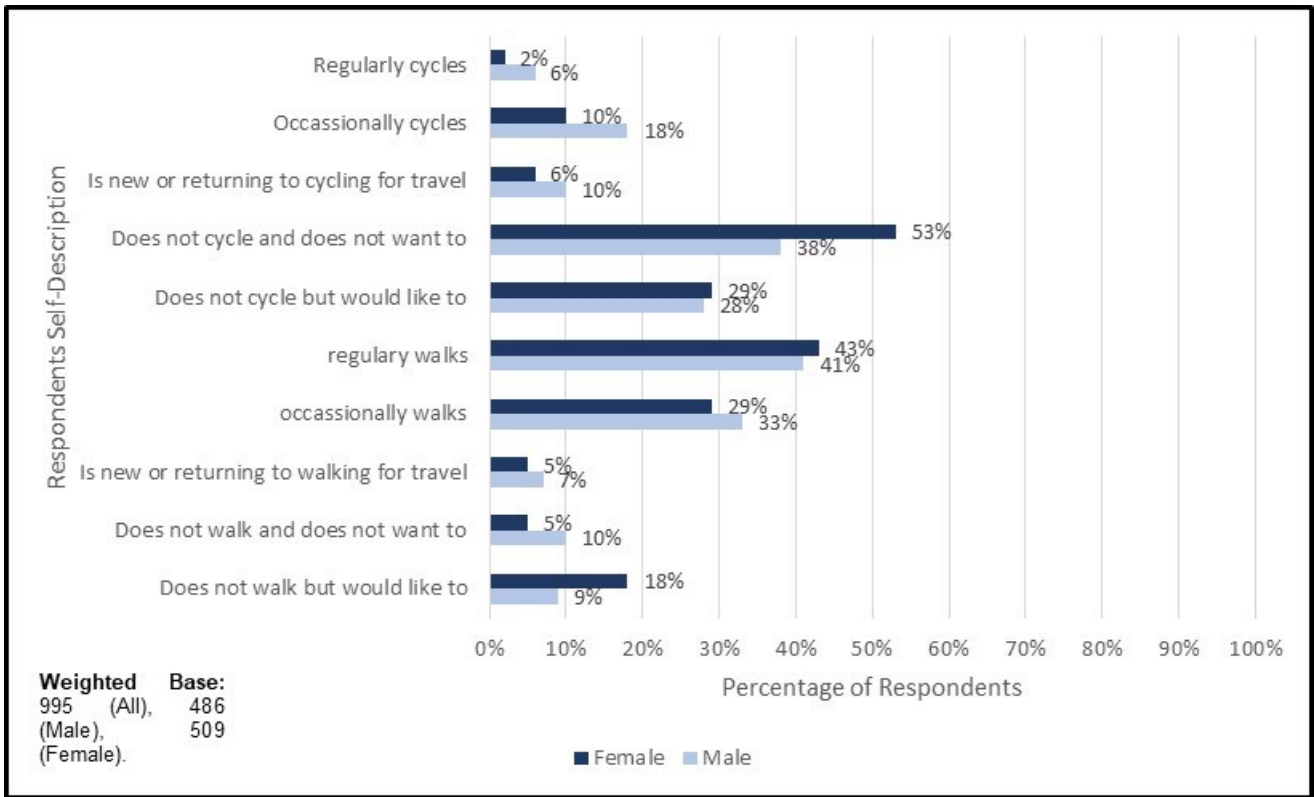
Would you say you are someone who	16-24	25-34	35-44	45-54	55-64	65+
Weighted Base (Total = 999)	119	174	215	110	193	188
does not cycle and does not want to	27%	38%	42%	39%	50%	70%
does not cycle but would like to	33%	35%	32%	33%	26%	18%
is new or returning to cycling	9%	9%	6%	14%	7%	3%
occasionally cycles	24%	12%	13%	12%	15%	9%
regularly cycles	6%	6%	6%	3%	3%	0%

²⁴ The respective number of female and male respondents were 272 out of 509 (female) and 187 out of 486 (male).

²⁵ The respective number of female and male respondents were 10 out of 509 (female) and 28 out of 486 (male).

²⁶ Figures may not sum to 100 owing to rounding.

Figure 3.9 Respondents' Self-Description Regarding Active Travel According to Gender



Perceptions of Active Travel

- 3.39 Respondents were asked about their perception of active travel in their local area.
- 3.40 Fifty-one per cent of all respondents reported that they had noticed more people walking and/or cycling in their local area in recent years. However, in percentage terms fewer respondents reported that there had been improvements in their local area for people who cycled or walked.

Improvements for people who walk

- 3.41 Thirty-two per cent of all respondents stated that there had been improvements in their local area for people who walk.
- 3.42 Twenty-three per cent of respondents aged over 55 stated that there had been improvements in their local area for people who walk (89 out of 381 respondents). However, 42 per cent of respondents aged 55 and over disagreed with this view (158 out of 381 respondents).

Table 3.6 Respondents' Views on Active Travel in their Local Area²⁷

	Strongly Agree	Agree	Neither Agree, Nor Disagree	Disagree	Strongly Disagree	Don't Know
In recent years there have been improvements in my local area for people who walk, for example widened pavements, new crossings, dropped kerbs	9%	23%	26%	23%	12%	7%
In recent years there have been improvements in my local area for people who cycle, for example new cycle tracks and crossings, cycle parking, signing, on-street bike hire	10%	28%	25%	17%	10%	9%
In recent years I have noticed more people walking and/or cycling in my local area	13%	38%	24%	13%	6%	6%
The council has sought the public's views on plans for new walking and cycling routes or to improve routes	6%	18%	26%	19%	16%	15%
I know where I can find information about walking and cycling routes in my local area	9%	23%	24%	20%	12%	11%

3.43 Opinion was more evenly split amongst younger people. Amongst those respondents aged 16 to 34, 36 per cent thought there had been improvements in their local area for people who walk in comparison with 31 per cent who disagreed with this view (107 and 91 out of 293 respondents respectively).

3.44 Forty-one per cent of respondents with school-age children stated that there had been improvements for people who walk in their local area compared with 28 per cent of respondents without school-age children who thought the same (117 out of 286 and 202 out of 714 respondents respectively).

²⁷ Figures may not sum to 100 per cent owing to arithmetical rounding.

Table 3.7 Respondents' Views on Improvements for People who Walk in their Local Area According to Age²⁸

In recent years there have been improvements in my local area for people who walk, for example widened pavements, new crossings, dropped kerbs	16-24	25-34	35-44	45-54	55-64	65+
Weighted Base (Total = 999)	119	174	215	110	193	188
Strongly Agree	13%	12%	17%	5%	5%	1%
Agree	25%	24%	27%	20%	19%	21%
Neither Agree, Nor Disagree	32%	22%	20%	35%	29%	24%
Disagree	15%	26%	23%	18%	27%	25%
Strongly Disagree	10%	9%	8%	19%	12%	19%
Don't Know	6%	7%	6%	3%	8%	9%

Improvements for people who cycle

- 3.45 In percentage terms, fewer respondents aged 55 and over agreed with the view that there had been improvements for people who cycle in their local area in comparison with younger respondents. Thirty-two per cent of respondents aged 55 and over agreed with this view compared with 40 per cent of respondents aged 16 to 34 (123 out of 381 respondents and 118 out of 293 respondents respectively).
- 3.46 Forty-five per cent of respondents with school age children stated that there had been improvements in their local area for people who cycle compared with 35 per cent of respondents without school age children (129 out of 286 respondents and 253 out of 714 respondents respectively).

²⁸ Figures may not sum to 100 per cent owing to arithmetical rounding.

Consultation and Access to Information about Active Travel

3.47 Overall, 24 per cent of all respondents agreed with the view that the council had sought the public's views on plans for new walking and cycling routes, or plans to improve routes in their local area. More respondents, however, disagreed with this view (35 per cent).

Table 3.8 Respondents' Views on Improvements for People who Cycle in their Local Area

In recent years there have been improvements in my local area for people who cycle, for example new cycle tracks and crossings, cycle parking, signing, on-street bike hire	16-24	25-34	35-44	45-54	55-64	65+
Weighted Base (Total = 999)	119	174	215	110	193	188
Strongly Agree	15%	9%	13%	9%	10%	8%
Agree	24%	33%	36%	22%	26%	21%
Neither Agree, Nor Disagree	30%	25%	19%	34%	21%	27%
Disagree	17%	19%	15%	16%	21%	16%
Strongly Disagree	8%	7%	10%	16%	11%	12%
Don't Know	6%	8%	7%	3%	11%	17%

3.48 There were notable differences amongst respondents who held strong views on the issue of consultation. Only 6 per cent of all respondents 'strongly agreed' with the view that their local council had sought the public's views on plans for new walking and cycling routes, or plans to improve routes. In comparison, more than twice as many respondents (16 per cent) stated that they 'strongly disagreed' with this view.

3.49 There were also notable differences of opinion amongst respondents of different ages.

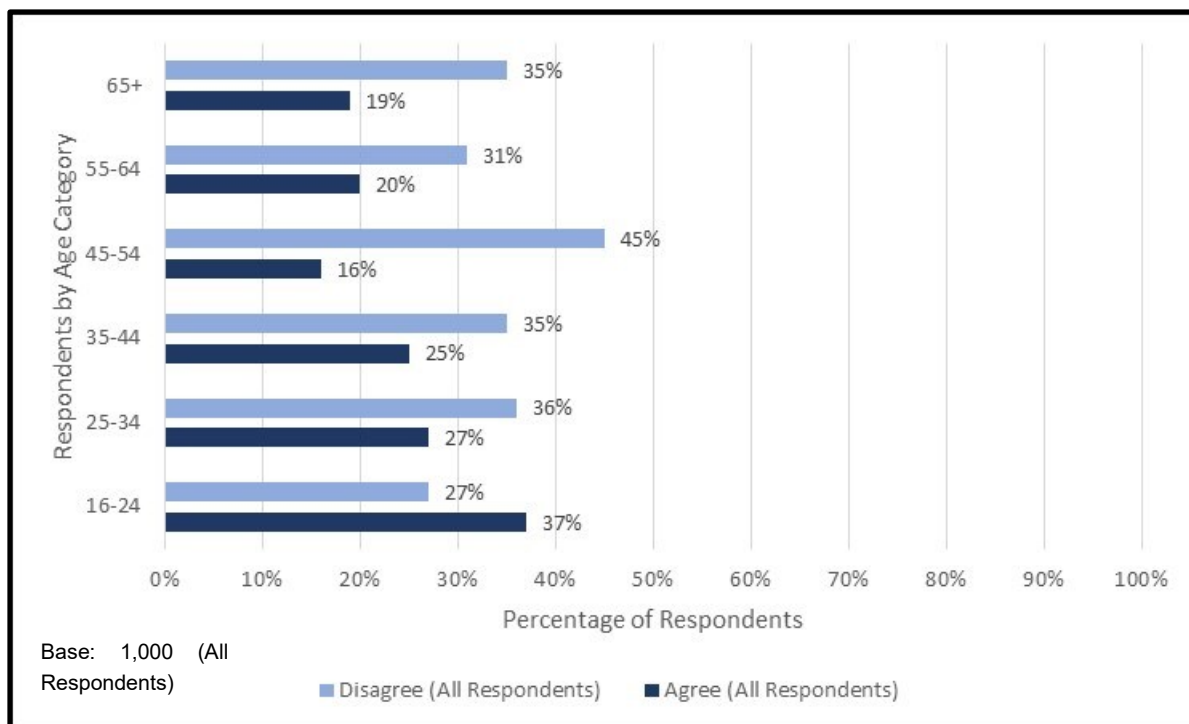
3.50 Forty-five per cent of respondents aged 45 to 54 disagreed with the view that the council has sought the public's views on plans for new walking and cycling routes, or plans to improve routes (49 out of 110 respondents). In comparison, only 16 per cent of respondents in this age category agreed with the view that the

local council had consulted the public (18 out of 110 respondents). Respondents aged 65 and over reported similar views on consultation (19 per cent agreed and 35 per cent disagreed).²⁹

- 3.51 In comparison, a greater percentage of younger respondents stated that their local council had sought the public's views. Thirty-seven per cent of respondents aged 16 to 24 agreed with the view that the council has sought the public's views on plans for new walking and cycling routes, or plans to improve routes (44 out of 119 respondents). Twenty-seven per cent of respondents in the age category 16 to 24 disagreed with the view that the local council had consulted the public on active travel routes (33 out of 119 respondents).
- 3.52 Generational differences were also observable when it came to respondents' views on access to information about walking and cycling routes.
- 3.53 Only 2 per cent of respondents aged sixty-five and over 'strongly agreed' with the view that they knew where they could locate information about walking and cycling routes (5 out of 188 respondents). In comparison, 13 per cent of respondents aged 16 to 34 'strongly agreed' with the view that they know where they can locate information about walking and cycling routes (39 out of 293 respondents).

²⁹ Out of a total of 188 respondents aged 65 and over, the respective were 35 (agree) and 65 (disagree).

Figure 3.10 Respondents' Views on Consultation by the Council Regarding Cycling Routes in their Local Area



What measures would promote active travel?

Walking

3.54 Respondents were asked to rate the utility of specified measures in terms of the extent to which they would help respondents to walk more (see question 5 in Annex B).

3.55 Measures which were most likely to be identified by respondents as 'useful' to help them walk more included:

- Well-maintained paths (78 per cent).
- Nicer routes along streets (77 per cent).
- More destinations closer to home (74 per cent).
- Better physical and/or mental health (75 per cent).

- 3.56 The measure identified by the greatest percentage of respondents (40 per cent) as either ‘not very useful’ or ‘not useful at all’ was slower speeds on roads.³⁰ The next measure identified by respondents in such terms was fewer motor vehicles on the streets: 33 per cent of respondents identified this measure as either ‘not very useful’ or ‘not useful at all’.
- 3.57 It was noticeable that fewer respondents aged 45 to 54 described any of the suggested measures as ‘useful’. For example, in comparison with other age categories, a smaller percentage of respondents aged 45 to 54 stated that fewer motor vehicles on the streets (45 per cent), slower speeds (41 per cent), and fewer parked cars on the pavements (52 per cent) would be useful in terms of helping them to walk more.³¹ For respondents in the age category 25 to 34, the corresponding figures for these measures were 57 per cent, 48 per cent, and 68 per cent.³²

Cycling

- 3.58 Respondents were asked to rate the utility of specified measures in terms of the extent to which they would help respondents to start cycling or to cycle more (see question five in Annex B).
- 3.59 No single factor was identified by respondents as decisive when it came to encouraging respondents to begin cycling or to cycle more.
- 3.60 More than 50 per cent of respondents identified each of the following factors as ‘useful’ in encouraging respondents to being cycling or cycle more:
- More cycle tracks along roads which are physically separate from traffic and pedestrians (51 per cent).
 - More traffic-free cycle routes away from road (54 per cent).
 - More sign-posted local cycle routes (50 per cent).

³⁰ The active travel survey for the Wales Omnibus was conducted in June 2022 prior to the national roll out of 20 mph on restricted roads in Wales.

³¹ Out of 110 respondents aged 45 to 54, the respective figures for these statements were 49 (fewer motor vehicles), 45 (slower speeds) and 57 (fewer parked cars).

³² Out of 215 respondents aged 25 to 34, the respective figures for these statements were 99 (fewer motor vehicles), 48 (slower speeds), and 68 (fewer parked cars).

- Better maintenance of cycle routes (51 per cent).
 - Better physical and/or mental health (55 per cent).
- 3.61 Amongst different categories of respondents there were noticeable differences of opinion on these measures. Only 35 per cent of over 55s (134 out of 381 respondents) thought slower speeds and/or fewer motor vehicles would be useful in comparison with 54 per cent of respondents aged 16 to 34 (159 out of 293 respondents).
- 3.62 This difference of opinion was mirrored in other respondent demographic categories. Fifty-one per cent of male respondents (249 out of 486 respondents) stated that slower speeds and/or fewer motor vehicles would be useful in compared to 42 per cent of female respondents (215 out of 509 respondents). Amongst respondents with and without school-age children, 54 per cent (with) and 44 per cent (without) stated that these measures would be useful.
- 3.63 Younger respondents were also more supportive of more traffic free routes. Sixty-five per cent of those aged 16 to 34 (191 out of 293 respondents) stated this measure would be useful in comparison with 38 per cent of those aged 55 and over (146 out of 381 respondents). Those respondents with school-age children were more supportive of this measure too. Sixty-two per cent of respondents with school-aged children (178 out of 286 respondents) stated that traffic free routes would be useful in comparison with 50 per cent of interviewees without school-age children (360 out of 714 respondents).
- 3.64 Respondents who said access to a standard or non-standard bicycle would help them to cycle more were asked a further set of questions regarding what would improve their access to bicycles.³³
- 3.65 The most popular option for these respondents was ‘making it cheaper or free to have bikes repaired and/or having the chance to learn to repair bikes’ (83 per cent). The least popular option was ‘access to short term hire bikes, such as public on-street bike hire’ (67 per cent).

³³ The figure of 518 is the weighted total of respondents who stated access to a bicycle or non-standard bicycle would help them to cycle more.

Figure 3.11 Respondents' Views on Measures to Help them Cycle More

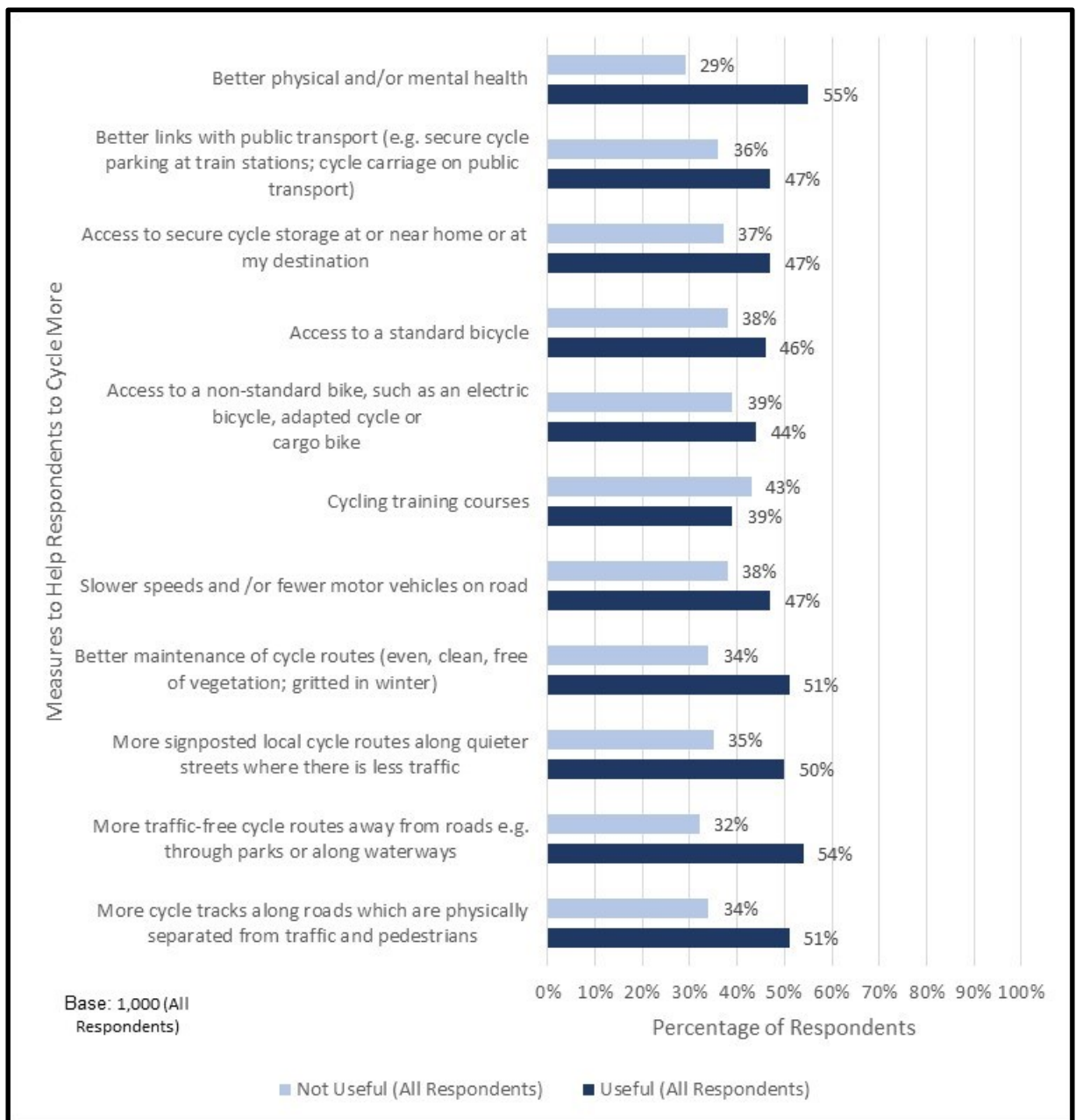
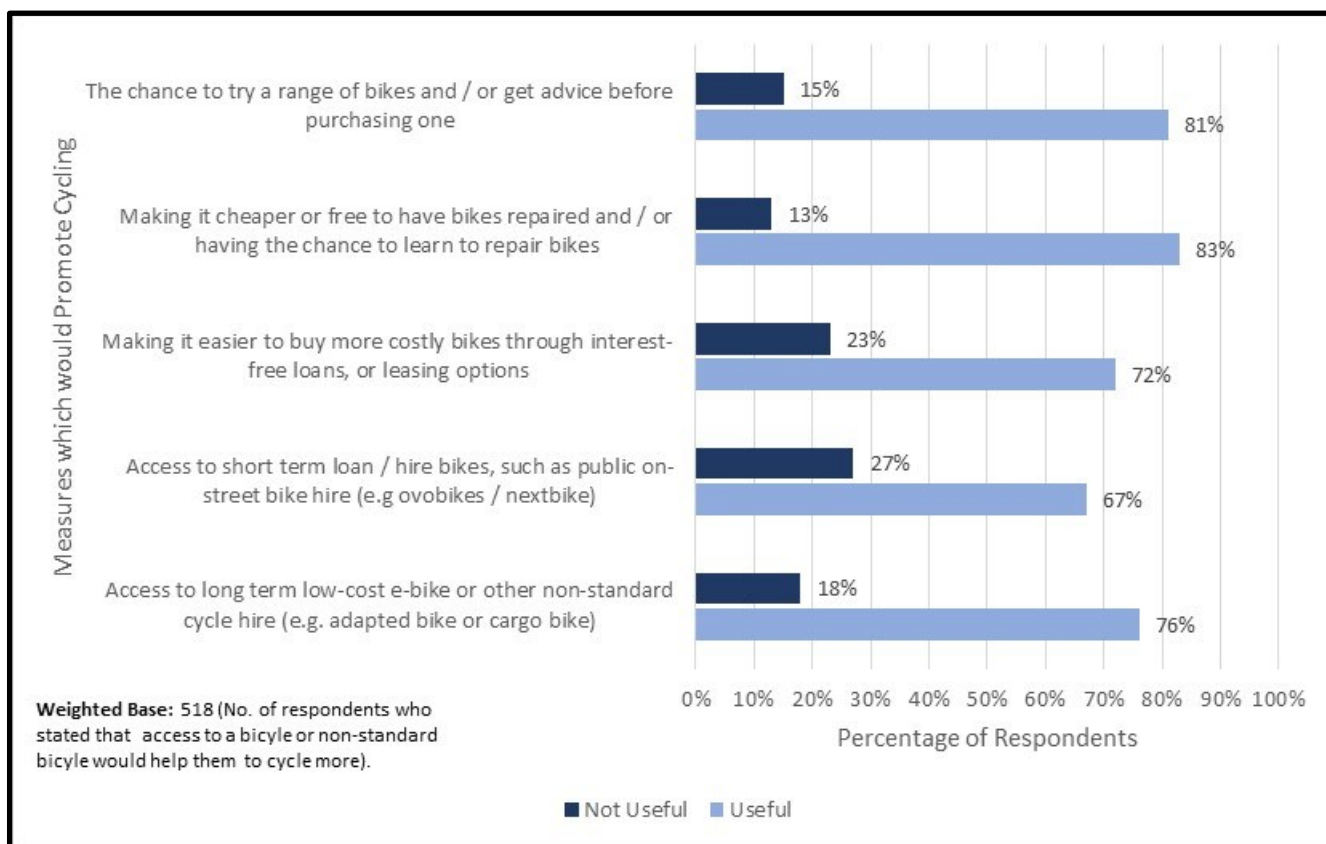


Figure 3.12 Respondents' Assessment of Measures to Improve Access to Bicycles



How safe did respondents feel in their local area in relation to active travel?³⁴

- 3.66 Respondents felt safer walking in their local neighbourhood than they did cycling on local roads. Eighty-eight per cent of all respondents felt safe walking in their local neighbourhood compared with 27 per cent who felt safe cycling on local roads.
- 3.67 There were some notable generational differences when it came to active travel and respondents' feelings of safety.
- 3.68 In percentage terms, respondents aged 16 to 24 felt less safe walking in their local neighbourhood in comparison with respondents aged 65 and over. Seventy-six per cent of respondents aged 16 to 24 (91 out of 119 respondents) agreed with the view that they felt safe walking in their local neighbourhood compared with 90 per cent of respondents aged 65 and over (169 out of 188 respondents).

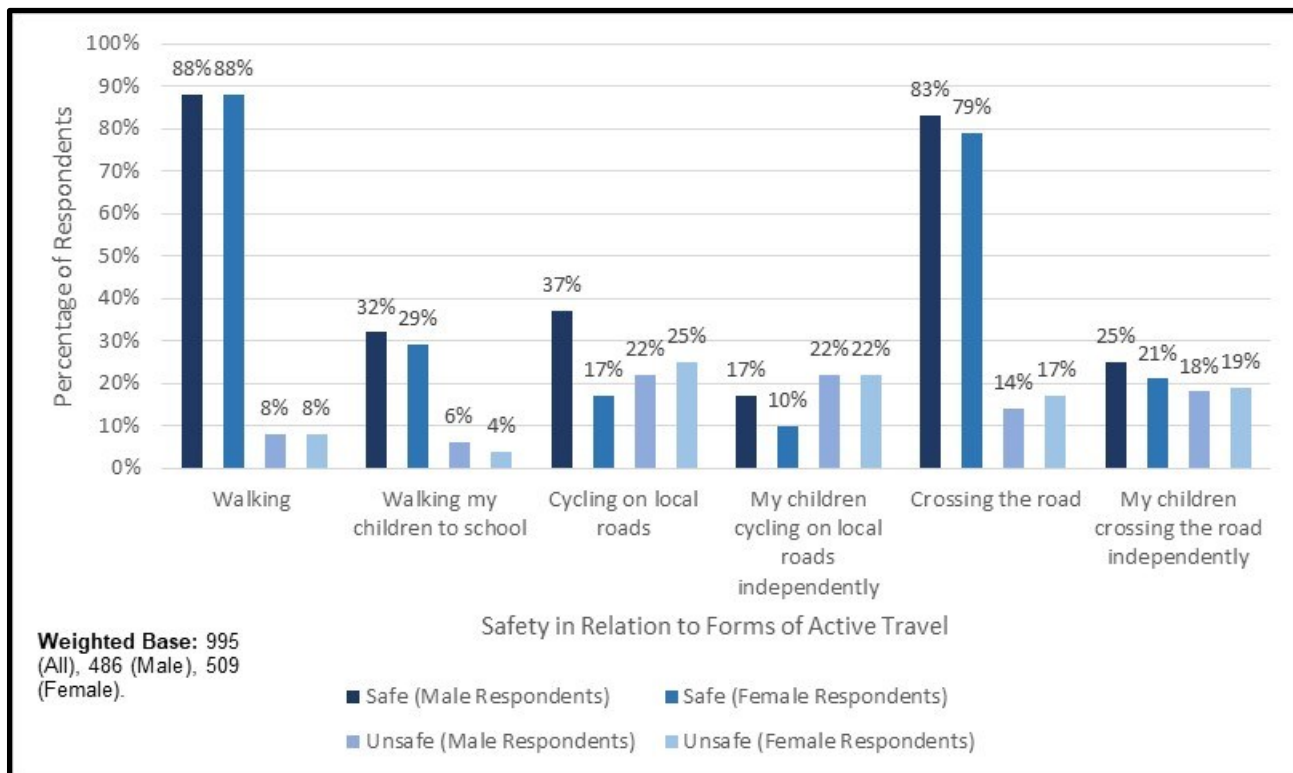
³⁴ For points 3.68 to 3.76, the figures for 'safe' and 'unsafe' are the respective sum totals for those respondents who reported that they felt 'very safe' or 'fairly safe', or 'not very safe' or 'not safe at all'.

- 3.69 Conversely, a greater percentage of respondents aged 16 to 24 reported that they felt 'very safe' (40 per cent) crossing the road in comparison with respondents aged 65 and over (27 per cent).³⁵
- 3.70 Similarly, only 2 per cent of respondents aged 55 to 64 (4 out of 193 respondents) reported that they felt 'very safe' cycling on local roads in comparison with 23 per cent of respondents aged 16 to 24 (28 out of 119 respondents). These differences may be a product of a high percentage of respondents aged 55 to 64 who stated that this issue was 'not applicable' for them (58 percent).
- 3.71 In percentage terms, however, younger respondents were less likely to feel safe walking their children to school. Approximately three in ten respondents aged 16 to 24 (28 per cent) stated that they felt safe walking their children to school in comparison with nearly six in ten respondents aged 35 to 44 (57 per cent).³⁶

³⁵ The respective figures were 47 out of 119 for respondents aged 16 to 24 and 51 out of 188 for respondents aged 65 and over.

³⁶ The respective figures were 33 out of 119 for respondents aged 16 to 24 and 123 out of 215 for respondents aged 35 to 44.

Figure 3.13 Respondents' Perception of Safety in Relation to Active Travel According to Gender



3.72 There were also differences between male and female respondents. Forty-eight per cent of male respondents (231 out of 486 respondents) reported that they felt 'very safe' walking in their local neighbourhood compared with 39 per cent of female respondents (199 out of 509 respondents). Overall, however, in percentage terms, equal numbers of male and female respondents reported that they felt safe walking in their local neighbourhood (88 per cent).³⁷

3.73 In contrast to male respondents, female respondents felt less safe cycling on local roads. Only 17 per cent of female respondents (87 out of 509 respondents) reported that they felt safe cycling on local roads in comparison with 37 per cent of male respondents (178 out of 486 respondents).

3.74 A greater percentage of male respondents (17 per cent) reported that they felt their children were safe cycling on local roads independently in comparison with female respondents (10 per cent).

³⁷ The respective figures were 428 out of 486 (male) respondents and 446 out of 509 (female) respondents.

4. Conclusions

- 4.1 More respondents walked and ran than cycled as an active form of travel in Wales. In June 2022, 74 per cent of all respondents walked or ran as a form of travel at least once a week. In comparison, only 14 per cent of respondents cycled as a form of travel at least once week.
- 4.2 There were generational differences when it came to rates of active travel. A greater percentage of younger respondents walked, ran and cycled more frequently. Eighty per cent of respondents aged 16 to 34 walked or ran at least once a week in comparison with 69 percent of those aged 55 and over who walked or ran at least once a week. Generational differences were also notable when it came to cycling. Eighteen per cent of respondents aged 16 to 34 cycled at least once a week in comparison with 7 percent of respondents aged 55 and over.
- 4.3 Respondents were asked if they were travelling either more or less by specific modes in June 2022 when compared with three years previously. More respondents reported that they were walking and running (41 per cent) or cycling (26 per cent) 'about the same' when compared with those respondents who stated that they were undertaking either more or less active travel journeys by these respective modes.
- 4.4 Respondents who reported that they were travelling either more or less by any mode were asked why their travel arrangements had changed. The data does not specify how respondents' travel arrangements changed according to mode. The results suggest respondents' travel arrangements were more likely to have changed because of circumstances beyond their control. The impact of COVID-19 on respondents' work and education arrangements (31 per cent) affected travel arrangements more than any other factor.
- 4.5 In contrast, the results indicate fewer respondents had made active choices about their modes of travel. Only 17 and 11 per cent of all respondents reported that they had chosen to travel differently for health and environmental reasons. It may be possible to infer from this that there is scope to investigate why fewer respondents opted to travel differently for health and environmental reasons. It also suggests there may be opportunities to promote active travel because of its health and environmental benefits, particularly since 65 per cent of all respondents reported

that better physical and/or mental health would encourage them to walk and/or cycle more.

- 4.6 Respondents were asked to describe themselves in relation to active travel journeys. The generational differences which were observable in terms of rates of active travel were also noticeable when it came to respondents' self-description. Of those respondents who did not cycle at the time of the survey but indicated that they would like to (289 respondents in total), a greater percentage of respondents aged 16 to 34 (34 per cent) described themselves in such terms in comparison with respondents aged 55 and over (22 per cent). A greater percentage of respondents aged 55 and over also described themselves as someone who 'does not cycle and does not want to cycle' (60 per cent) in comparison with respondents aged 16 to 34 (34 per cent). This suggests there may be greater potential to promote cycling as a form of active travel amongst younger people.
- 4.7 Respondents were asked about their perception of active travel in their local area. More than half of all respondents (51 per cent) reported that they had noticed more people walking and/or cycling in their local area in recent years. However, fewer respondents agreed with the view that there had been improvements in their local area for people who walk (32 per cent) or cycle (38 per cent).
- 4.8 More respondents also held negative views about consultation regarding active travel. Thirty-four per cent of all respondents disagreed with the view that their local council had consulted the public concerning plans for existing or new active travel routes. In contrast, 24 per cent of all respondents agreed that the council had consulted the public regarding these issues. Thirty-two per cent of all respondents also reported that they did not know where to access information regarding active travel routes in their local area. This suggests there may be reason to investigate how information concerning active travel is disseminated publicly, and how the public engage with this information.
- 4.9 Respondents were asked about measures which would help them to take more active travel journeys. Greater numbers of respondents identified improvements to active travel infrastructure, such as well-maintained paths for pedestrians (78 per cent) and traffic-free cycle routes (54 per cent), as respective measures which

would help them to walk and cycle more. In comparison, fewer respondents stated that slower road speeds and fewer vehicles on the streets and roads would help them to walk (55 per cent) and cycle more (47 per cent).

- 4.10 Despite these views on slower road speeds and the volume of motor traffic, the survey results suggest that safety concerns may have been a barrier to specific forms of active travel. Less than three in ten respondents (27 per cent) reported that they felt safe cycling on local roads.³⁸ A greater percentage of respondents reported that they felt safe walking in the local neighbourhood (88 per cent). However, out of 413 respondents for whom the issue was applicable, 46 per cent stated they did not feel their children were safe crossing the road independently. Similarly, out of 351 respondents for whom the issue was relevant, 63 per cent stated that they did not feel their children were safe cycling independently on local roads. Safety concerns were an issue for other demographic groups. Notably, less than two in ten female respondents (17 per cent) reported that they felt safe cycling on local roads. These results suggest there may be value in investigating why specific demographic groups do not feel safe when it comes to active travel, particularly cycling.

³⁸ This figure of 27 per cent needs to be understood in a context where 45 per cent respondents stated that cycling on local roads was not applicable to them.

5. Annex A

Methodology Continued

- 5.1 Beaufort Research conducted the interviews online using the Cint™ online panel exchange platform. The Cint™ platform and its products comply with various industry standards including ISO 20252 - the international quality standard for market research services. Multiple data quality checks are built into the Cint™ system and Beaufort Research builds in its own quality control questions and measures within the survey and excludes respondents who fail these checks.
- 5.2 The survey uses interlocking quota controls of age within gender.³⁹ A further separate quota control was set on social grade and questionnaires were completed by residents of every local authority in Wales.
- 5.3 At the analysis stage, the data was weighted by age group, gender, Local Authority grouping and social grade. This ensures the sample reflects the 2011 census and the demographic characteristics of the Welsh adult population (16+).
- 5.4 Demographic questions are included as standard in the Wales Omnibus survey. The survey was available in English and Welsh and could be taken in participants' preferred language.

³⁹ Quota controls are target numbers of interviews which are set for specific demographic groups within the population. Interlocking demographic quota controls means that the target incorporates two variables: age group within gender.

6. Annex B

Questions for the Wales Omnibus Welsh Government Active Travel Survey

Firstly, we would like to ask some questions about how you travel around.

Please note: When asked about travel by walking or cycling throughout this questionnaire, please answer for journeys that are to a destination or a public transport connection rather than for purely recreational trips, such as going for a walk, run or leisure bike ride. Please always consider walking to include the use of wheelchairs and mobility scooters, and when bikes are referred to, these also include other types of cycles, such as tricycles or handcycles.

Q1 Thinking about the different ways in which you travel around (excluding recreational trips, such as going for a walk, run or leisure bike ride), how often do you...?’

Please give your best guess.

- a) Travel by car, van or motorcycle as a driver
- b) Travel by car, van or motorcycle as a passenger (including taxis and private hire)
- c) Walk or run
- d) Cycle
- e) Use public transport
- f) Use a scooter or electric scooter

- 7 days a week
- 5-6 days a week
- 2-4 days a week
- Once a week
- Once a fortnight
- Once a month
- Less often
- Never

Q2 For each of these ways of traveling, would you say you do it more or less now than 3 years ago?

- a) Travel by car, van or motorcycle as a driver

- b) Travel by car, van or motorcycle as a passenger (including taxis and private hire)
- c) Walk or run
- d) Cycle
- e) Use public transport
- f) Use a scooter or electric scooter

A lot more

A little more

About the same

A little less

A lot less

Not applicable – I haven't used this way fo travelling for at least 3 years

ASK Q3 IF TRAVEL MORE/LESS TO ANY AT Q2

Q3 Thinking about your answers to the previous question, why do you think your ways of travelling have changed? Please select all that apply.

My work / education circumstances have changed due to COVID-19

My work / education circumstances have changed for another reason

My family circumstances have changed

My health has changed

Other personal circumstances have changed

I choose to travel differently for health reasons

I choose to travel differently for financial reasons

I choose to travel differently for environmental reasons

Other reasons (please specify: _____)

Q4. Which of the following modes of travel do you ever use for each of the following journeys? Please select all the methods you use to make each complete journey.

Randomise order	Travel by car, van or motorcycle as a driver	Travel by car, van or motorcycle as a passenger (including taxis and private	Wal k or run	Cycl e	Use public transpo rt	Use a scoote r or electri c scoote r	Othe r	Not applicabl e

			hire)						
i)	Commuting to or for work or education (other than taking children to school)								
ii)	Taking children to / from school								
iii)	Shopping, personal business (hairdressers etc), health								
iv)	Visiting friends and family / going out								
v)	Taking / accompanying other people (other than taking children to school)								

And now some questions about why you walk and cycle or not.

Q5 How useful would each of the following be to help you walk more?

- a) More direct routes to where I want to go
- b) Well-maintained pavements and paths (even, clean, uncluttered, well-lit; gritted in winter)
- c) Fewer motor vehicles on our streets
- d) Slower speeds on roads
- e) Fewer cars parked on the pavement
- f) More dropped kerbs at crossing points
- g) Wider pavements
- h) More frequent safe road crossings, with reduced wait times
- i) Nicer routes along streets with places to stop and rest, e.g. more benches, trees and shelters and public toilets
- j) Better information and signage for walking routes
- k) More destinations such as shops, banks, surgeries, schools, cafes, parks etc. close to your home
- l) Better physical and / or mental health

Very useful

Fairly useful

Not very useful

Not useful at all

Don't know

Q6 How useful, if at all, would any of the following be to help you start cycling or to cycle more?

- a) More cycle tracks along roads which are physically separated from traffic and pedestrians
- b) More traffic-free cycle routes away from roads e.g. through parks or along waterways
- c) More signposted local cycle routes along quieter streets where there is less traffic
- d) Better maintenance of cycle routes (even, clean, free of vegetation; gritted in winter)
- e) Slower speeds and /or fewer motor vehicles on roads
- f) Cycling training courses
- g) Access to a standard bicycle
- h) Access to a non-standard bike, such as an electric bicycle, adapted cycle or cargo bike
- i) Access to secure cycle storage at or near home or at my destination
- j) Better links with public transport (e.g. secure cycle parking at train stations; cycle carriage on public transport)
- k) Better physical and/or mental health

Very useful

Fairly useful

Not very useful

Not useful at all

Don't know

If answered 'very or fairly useful' to g and /or h:

Q7 How useful would any of these options be to improve access to bikes for you personally?

- a) Access to long term low-cost e-bike or other non-standard cycle hire (e.g. adapted bike or cargo bike)
- b) Access to short term loan / hire bikes, such as public on-street bike hire (e.g. ovobikes / nextbike)
- c) Making it easier to buy more costly bikes through interest-free loans, or leasing options
- d) Making it cheaper or free to have bikes repaired and / or having the chance to learn to repair bikes
- e) The chance to try a range of bikes and / or get advice before purchasing one

Very useful
Fairly useful
Not very useful
Not useful at all
Don't know

Still thinking about travel by walking or cycling for journeys that are to a destination or a public transport connection rather than for purely recreational trips, such as going for a walk, run or leisure cycle ride...

Q8a Which one of the following statements best describes you? Would you say you are someone who...

does not cycle but would like to
does not cycle and does not want to
is new or returning to cycling
occasionally cycles
regularly cycles

Still thinking about travel by walking or cycling for journeys that are to a destination or a public transport connection rather than for purely recreational trips, such as going for a walk, run or leisure cycle ride...

Q8b Which one of the following statements best describes you? Would you say you are someone who...

does not walk but would like to
does not walk and does not want to
is new or returning to walking for travel

occasionally walks
regularly walks

Q9 And now some questions on your views about transport, walking and cycling in your local area.

To what extent do you agree or disagree with each of the following statements?

- a) In recent years there have been improvements in my local area for people who walk, for example widened pavements, new crossings, dropped kerbs
- b) In recent years there have been improvements in my local area for people who cycle, for example new cycle tracks and crossings, cycle parking, signing, on-street bike hire
- c) In recent years I have noticed more people walking and/or cycling in my local area
- d) the council has sought the public's views on plans for new walking and cycling routes or to improve routes
- e) I know where I can find information about walking and cycling routes in my local area

Strongly agree
Agree
Neither agree nor disagree
Disagree
Strongly disagree
Don't know

ASK ALL

Q10. Are you in education and/or or do you have any children in any of the following situations? Tick all that apply

- Yes – I have a child / children in primary school
- Yes – I have a child / children in secondary school or sixth-form college
- Yes – I'm at secondary school or sixth-form college
- Yes – I'm at university / college / other education
- No, none of the above

ASK IF HAVE PRIMARY/SECONDARY SCHOOL AGE CHILDREN, OR IF AT SECONDARY SCHOOL/SIXTH-FORM COLLEGE (OPTIONS 1 to 3 AT Q10)

Q11 To what extent to you agree or disagree that...

- a) Schools encourage children to walk, scoot or cycle to school in my local area
- b) Children receive or are offered cycle training in my local area
- c) Facilities at school for travelling to school by cycle or on foot (e.g. cycle or scooter parking, clothes drying areas) have improved in recent years

Strongly agree
 Agree
 Neither agree nor disagree
 Disagree
 Strongly disagree
 Don't know

Q12 How safe do you feel in your neighbourhood when doing the following...?
(Randomise order)

- i) Walking
- ii) Walking my children to school
- iii) Cycling on local roads
- iv) My children cycling on local roads independently
- v) Crossing the road
- vi) My children crossing the road independently

Very safe
 Fairly safe
 Not very safe
 Not at all safe
 Don't know
 Not applicable

Q13 How many of each of the following do you own in your household?

- a) Adult pedal bicycles (non-electric)
- b) Adult electric bicycles
- c) Other adult cycles, including hand-cycles, tricycles, tandems, recumbents, cargo-cycles(pedal or electric)
- d) Children's bicycles, including tricycles and other types of cycles (pedal or electric)
- e) Adult scooters
- f) Children's scooters

None
 One
 Two
 Three or more

Plus standard profile questions: age, gender, socioeconomic grade, Welsh region, whether speak Welsh

And additional breaks for: household composition (NB children in household), working status, limiting illness and ethnicity