

Active travel: Summary of survey

February 2018

The **Economy, Infrastructure and Skills Committee** is looking at the Active Travel (Wales) Act 2013. As part of its inquiry, the Committee conducted a survey to help it to understand how and why people in Wales walk and cycle, and why they don't.

Survey promotion and analysis

The public were encouraged to take part in the survey through Education and Youth Engagement school visits, Front of House tours and through the Committee and Assembly Twitter and website presence. Facebook advertising was used to target a wide geographical spread and non-active travellers.

To compile this summary an in-depth analysis of a complete data set was conducted; all data can be sourced to individual responses and further analysis can be undertaken upon request, Survey questions can be found at the end of this summary.

Results are calculated from the number of respondents who answered the specific question and not the overall number of respondents of the survey.

Survey respondents

2,506 survey responses were collected. Responses have been categorised into the following groups:

- All responses – **2,506** total responses
- Young people – **549** total responses
- Adult active travellers – **1,157** responses
- All other adult respondents – **520** responses

All other adult respondents comprised of the four following groups:

- A. Those who do not want to ride
- B. Those who do not ride but would like to
- C. Those who occasionally ride
- D. Those who are new or returning to bike riding



Cycling

1. 91% of all respondents own a bike with 83% of young people owning a bike.

How often and where do you ride a bike?

2. 54% of adult active travellers cycle to work most days with 14% of all respondents never cycling to work.
3. 63% of young people surveyed never cycle to school.
4. 26% of all respondents and 57% of young people surveyed never cycle for shopping and personal business.
5. 47% of young people and 71% of active travellers cycle for leisure most weeks and months. 50% of those who occasionally cycle or would like to cycle more, cycle less than once a month for leisure.

How do you rate cycle routes in your area?

6. 63% of active travellers and 56% of those who occasionally ride rated the number of cycle routes as poor to very poor.
7. 55% of active travellers rated the directness of cycle routes as poor to very poor. However, 30% of young people rating the directness of cycle routes as good.
8. 63% of active travellers and 54% of those who do not ride but would like to, rate the condition of cycle routes as poor to very poor. However, 30% of those who are new or returning to cycling rated the condition of cycle routes as good.
9. 30% of all respondents rated signage of cycle routes as poor.
10. 59% of active travellers and 74% of those who do not ride but would like to, rate the safety of cycle routes as poor to very poor. However, 20% of those who occasionally ride rate the safety of cycle routes as good.

How good is the security of bicycle parking you use?

11. 28% of all respondents rated the security of bicycle parking as good with 25% giving a rating of poor. 32% of active travellers and 32% of those who are new or returning to cycling rated security of bicycle parking as poor.

Walking

How often and where do you walk?

- 12.** 49% of those who do not want to cycle and 38% of those who occasionally cycle, walk to work most days. 26% of all respondents never walk to work.
- 13.** 35% of young people walk to school most days with 37% of young people never walking to school.
- 14.** 67% of all respondents, 72% of those who occasionally cycle and 40% of active travellers, walk for shopping and personal business most days and weeks.
- 15.** 73% of all respondents and 60% of young people, walk for leisure most days and weeks.

How do you rate walking in your area?

- 16.** 41% of all respondents rated the number of walking routes as good.
- 17.** 40% of all respondents rated the directness of walking routes as good.
- 18.** 35% of all respondents rated the condition and safety of walking routes as good. Of those who do not want to cycle, 40% rated the condition of walking routes as poor to very poor and 43% rated the safety of walking routes as poor to very poor.

Safety and security of other modes of transport

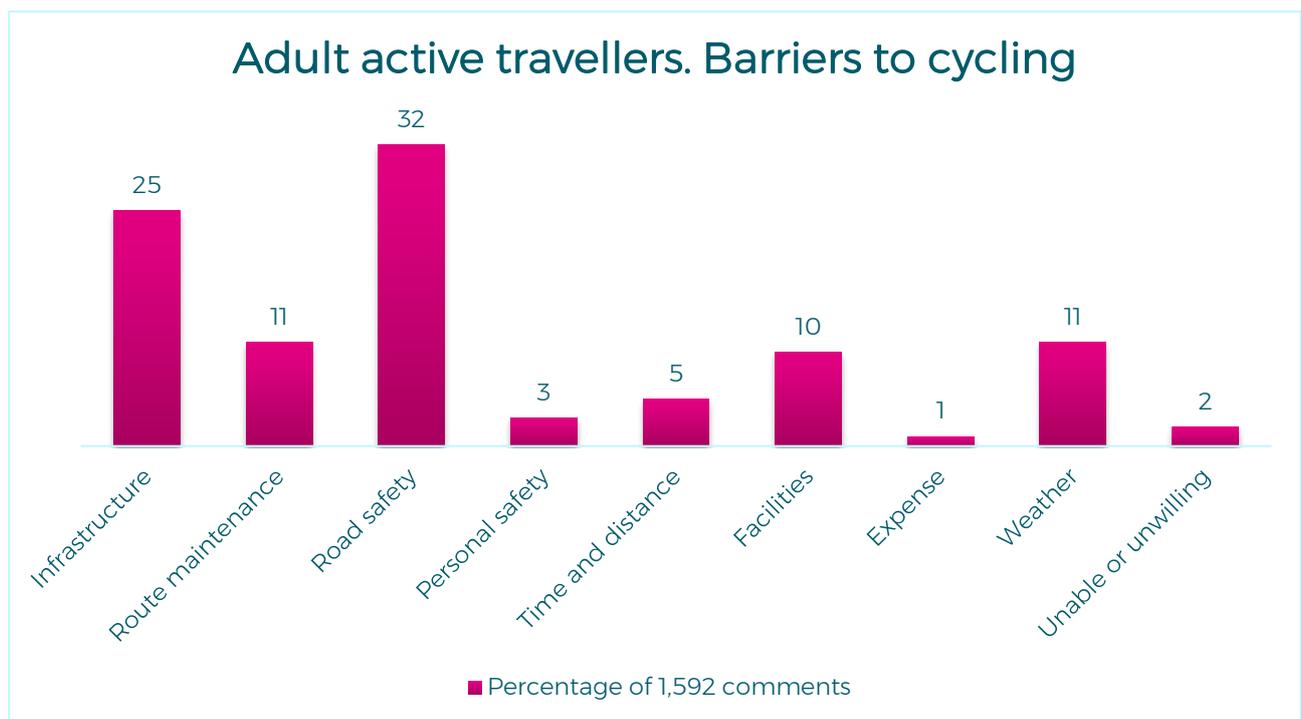
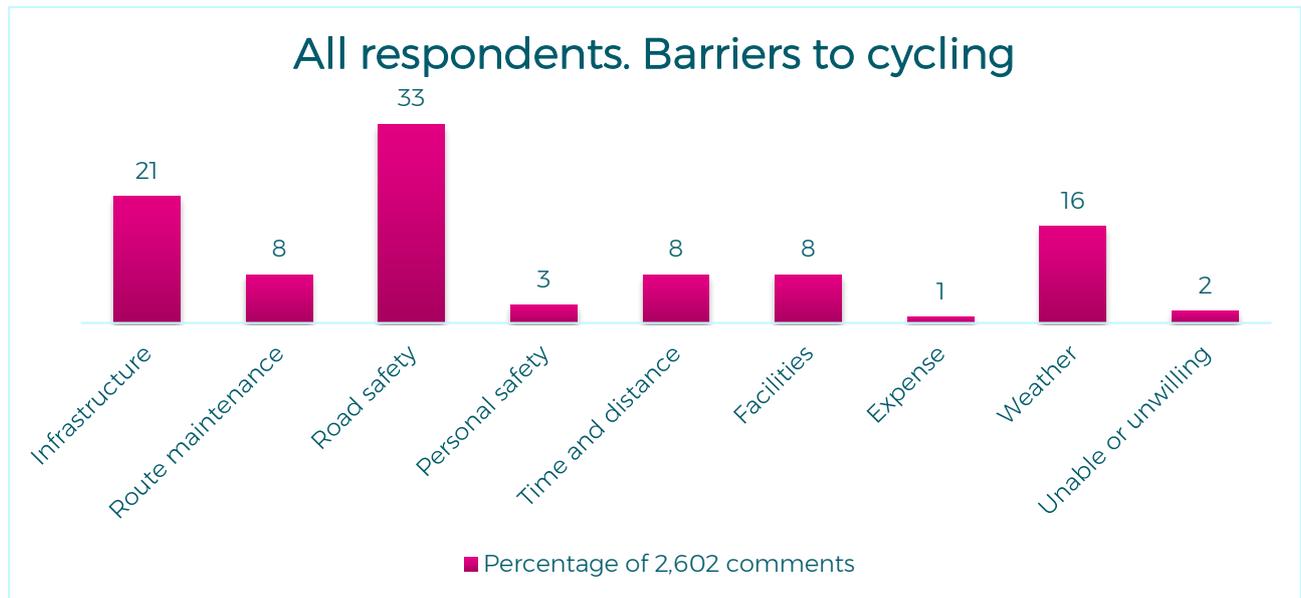
- 19.** 43% of all respondents rated driving as fairly safe.
- 20.** 60% of active travellers rated cycling as very to fairly unsafe. 55% of those who do not want to cycle rated cycling as very unsafe and 38% of new or returning cyclists rated cycling as fairly unsafe.
- 21.** 45% of all respondents rated walking as fairly safe.
- 22.** 40% of all respondents rated public transport as fairly safe.

Barriers and perceptions

Respondents were asked to comment on barriers to walking and cycling. Qualitative data analysis revealed nine overarching themes.

Theme	Description
Infrastructure	<ul style="list-style-type: none"> • Connected routes • More routes • Designated lanes • Connectivity of public transport and ability to take bikes onto trains/buses • Narrow paths • Signage
Route maintenance	<ul style="list-style-type: none"> • Litter/broken glass • Dog mess • Potholes • Cars parked on the route
Road safety	<ul style="list-style-type: none"> • Speed and volume of traffic • Dangerous drivers and poor attitude towards cyclists and walkers • Sharing cycle lanes with buses and taxis
Personal safety	<ul style="list-style-type: none"> • Poor lighting • Stranger danger • Perceived fear of personal safety
Time and distance	<ul style="list-style-type: none"> • Not enough time to cycle/walk to destination • Work family commitments • Distance to destination to far
Facilities	<ul style="list-style-type: none"> • Bike parking and storage • Showers • Lockers
Expense	<ul style="list-style-type: none"> • Bike repair and purchase
Poor Weather	
Unable or unwilling	<ul style="list-style-type: none"> • Disability / health • 'Laziness' • Personal choice to take the car • Unable to carry work/personal items on a bike • Unable to take children on school run and continue to work

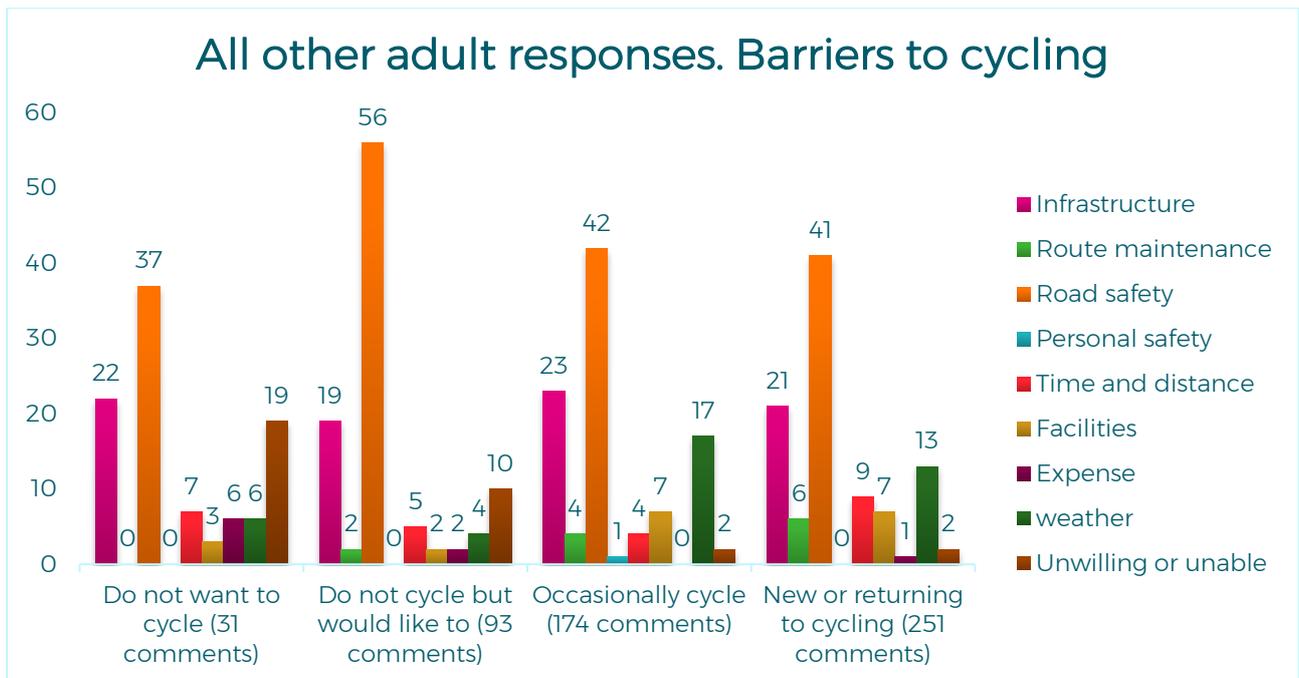
Barriers to cycling



Barriers to cycling quotes from active travellers:

- There is a lack of showers and changing facilities at work and a lack of secure places to leave my bike.
- Having to book my bike on a train, which only takes two bikes anyway, and not being able to get my bike on public transport

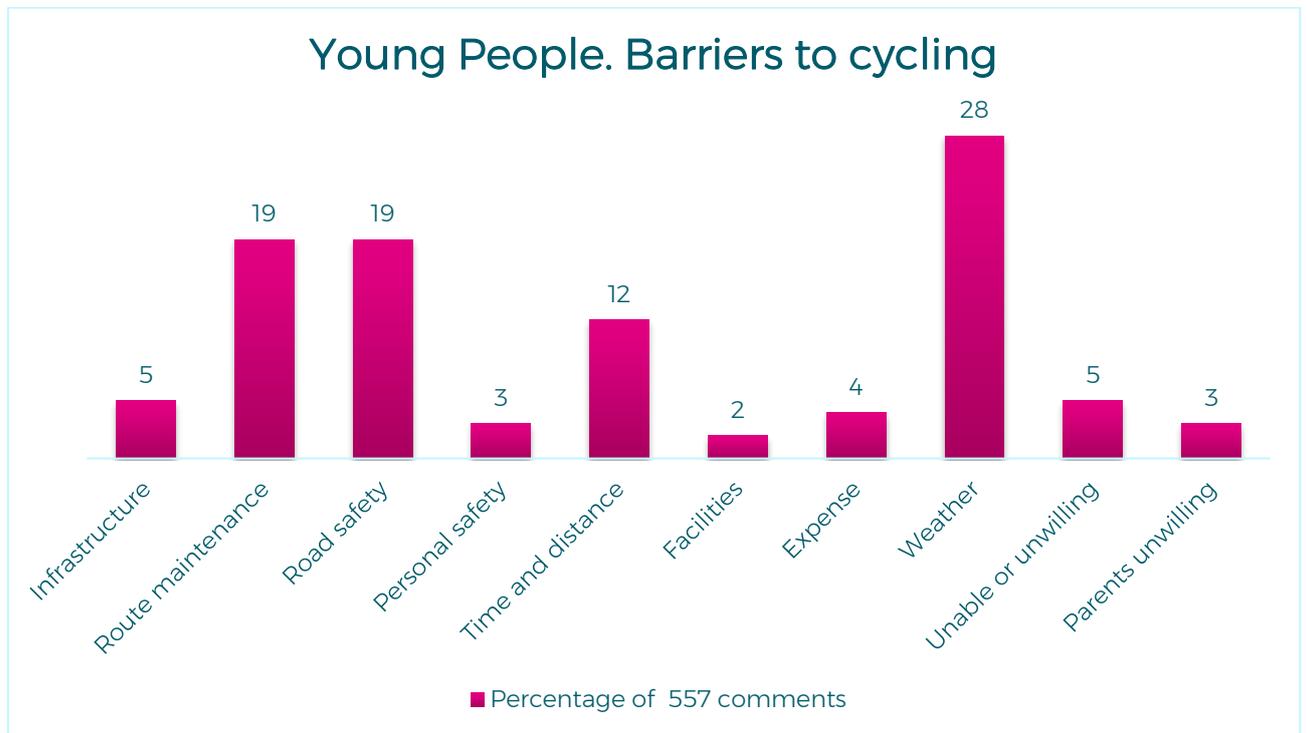
- There is a lack of connected, off-road or protected routes. While I am privileged to have a great East to West route, if I wish to deviate from this route there is very poor safe cycle provision, particularly if I want to make trips with my family.
- I don't like cycling alone in the dark because of poor lighting, especially when there are groups of youths who can be very intimidating.
- Poor driving from other road users and little respect to cyclists given by drivers. There are also cars parked in cycle lanes and dog walkers showing little regard on cycle paths
- I encounter significant risk cycling to my destination from poorly surfaced roads, obstructed cycle lanes, at best inconsiderate and at worst dangerous driving on every journey.



Barriers to cycling quotes from all other adults respondents;

- Roads are far too dangerous because of the lack of connected cycle lanes, potholes and car and lorry drivers not paying attention to cyclists.
- There is a lack of storage and changing facilities at work. Fear of safety at night is also an issue, as cycle routes are dark and isolated.
- My safety and my family's safety means It's not practical for me to cycle to work due to distance and I need to drop my child to school.

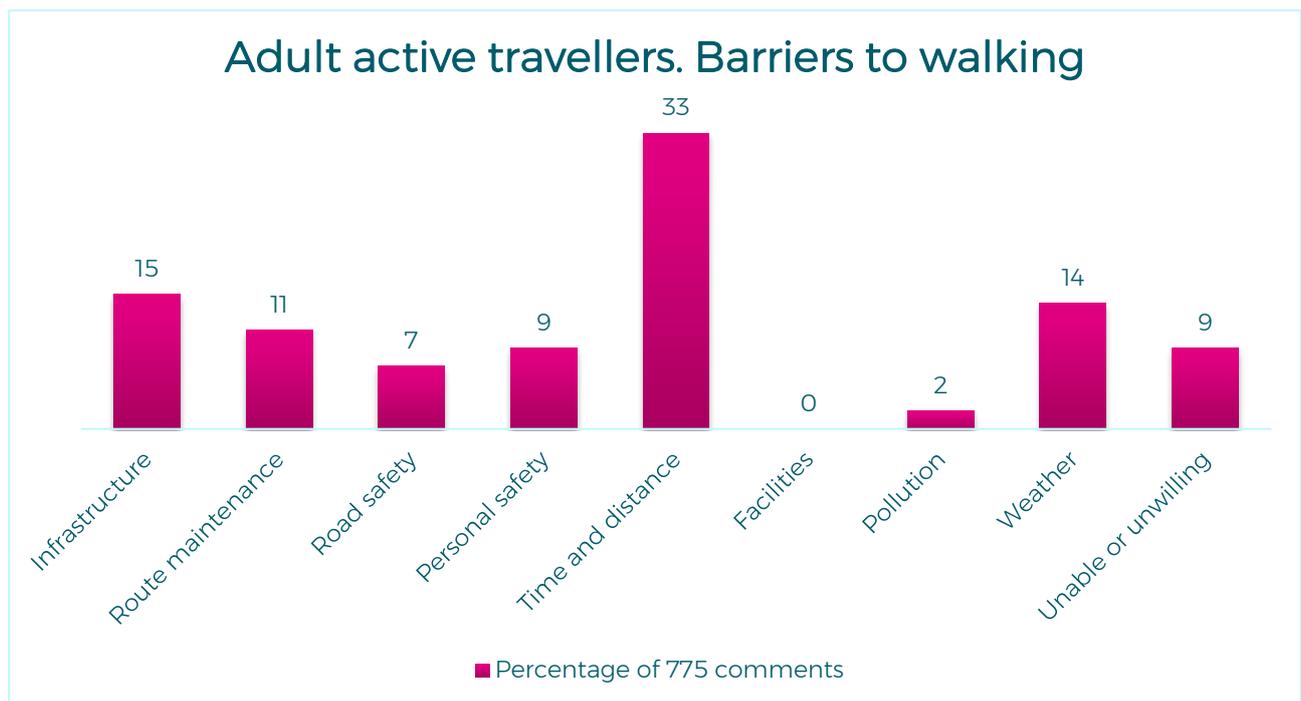
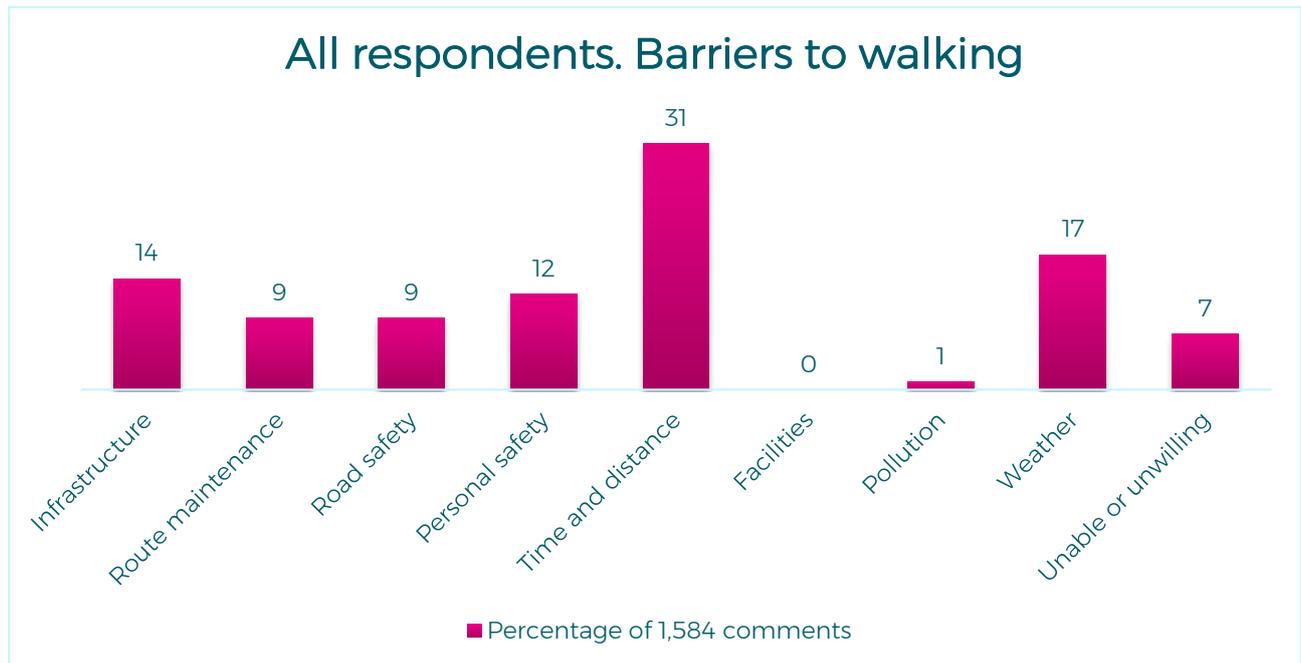
- Lack of good facilities to store bikes at railway stations. There is also insufficient space on public transport to carry cycles (and pushchairs / wheelchairs)



Barriers to cycling quotes from young people:

- I don't get to go on my own because my parents won't let me because it can be too dark
- The cars travel so fast and zoom past you, I don't feel safe
- Pollution from cars and litter on the road stops me from cycling. I also worry about personal safety with stranger danger
- The weather can be too cold and wet to go out on a bike and the journey can be too far away

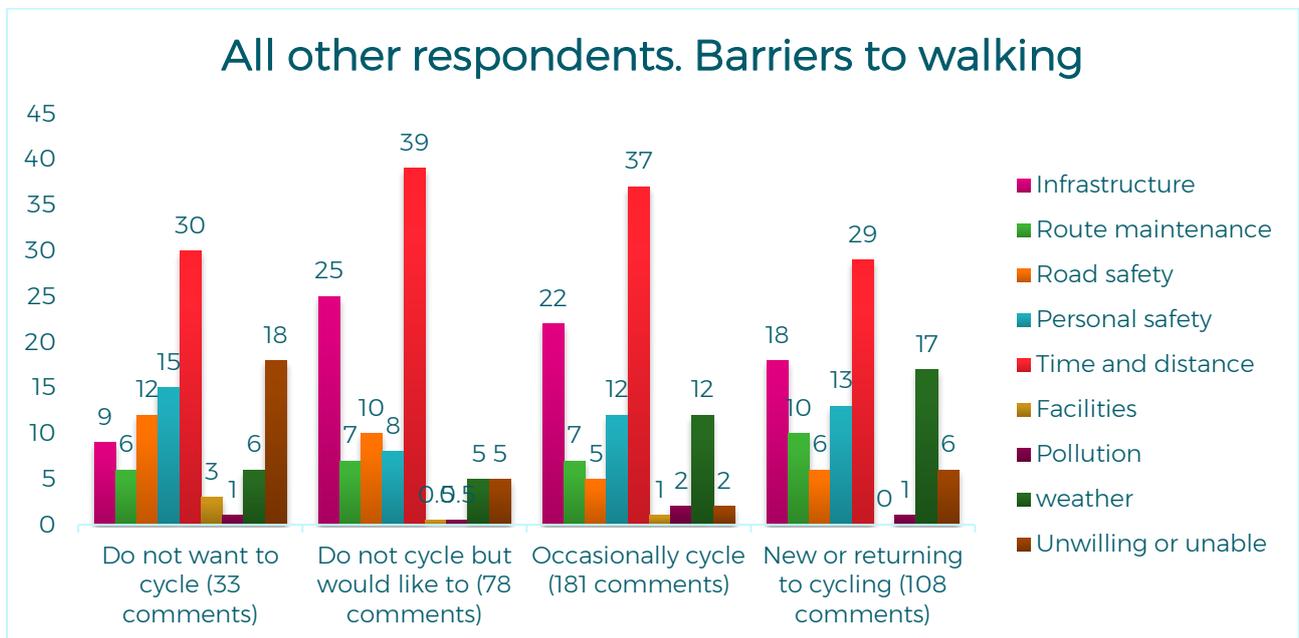
Barriers to walking



Barriers to walking quotes from adult active travellers:

- Poor public transport links don't enable me to walk at least part of a journey rather than driving the whole way
- Indirectness of pedestrian access to and from the destination and terrible condition and maintenance of public rights of way

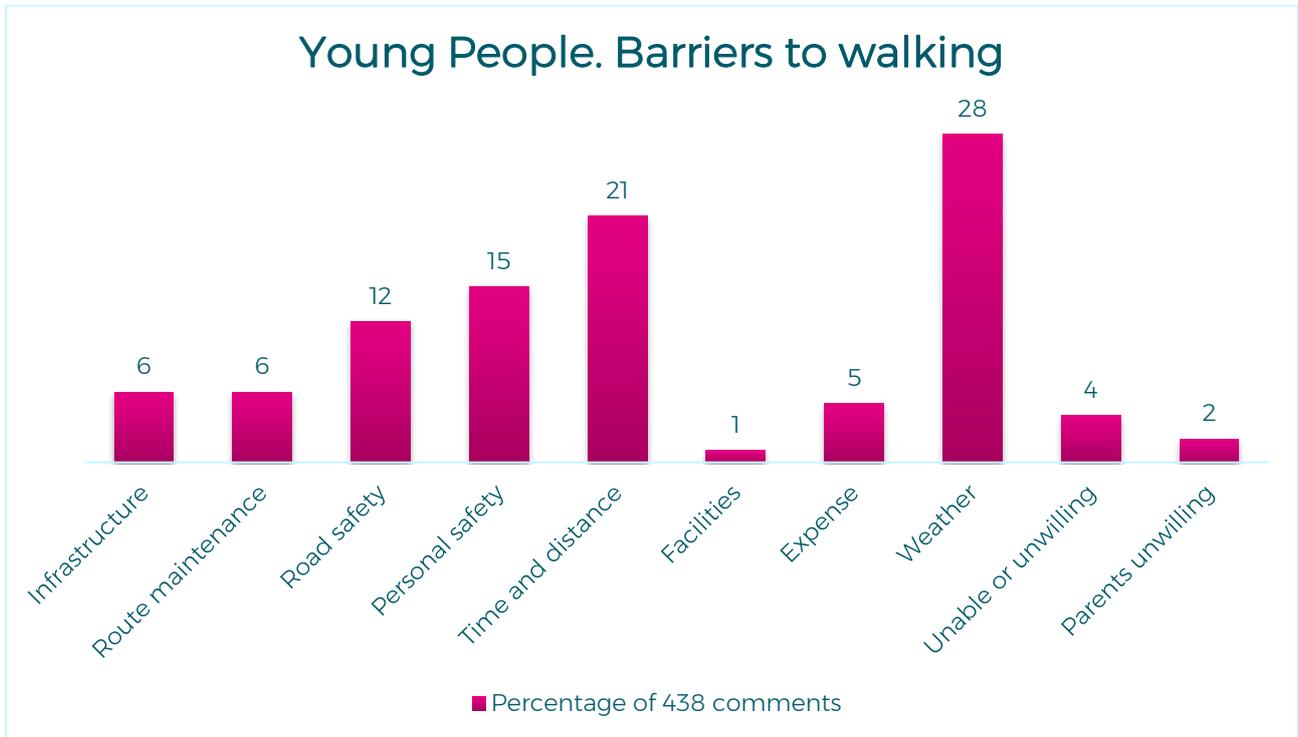
- No clearly defined areas for cyclists and pedestrians. Both users are on the same pathway, which can be dangerous on narrower lanes.
- Poor lighting is a safety concern especially for myself as a woman and my teenage daughters
- Mainly the time it takes especially with young children. Having to walk along a congested high volume traffic road meaning high levels of pollution is a barrier.
- It's too far to walk to my place of work and university, and there are very few local amenities within walking distance.



Barriers to walking quotes from all other respondents:

- With unlit routes with no pavements, it's not safe to walk the route between home and work, which means I have to use the car.
- Poor quality paths, mud and deep puddles make areas impassable, along with dog fouling and a lack of pedestrian crossings
- I live too far away to walk to places I go e.g. where family live, where I shop and socialise, GP practice, library, yoga classes
- I can't carry all my tools to my various workplaces, which stops me from walking as I have to take the van
- I don't feel safe walking if I'm going out alone at night.

- Having to share paths with cyclists who think they own the road is a barrier to walking more
- Traffic fumes and lack of safe crossings are a barrier to walking regularly



Barriers to walking quotes from young people:

- The roads are very busy and cars sometimes don't let you cross
- parents won't let me as I live on a farm and they worry about traffic on the lanes
- I feel unsafe at night
- It's normally rainy and wet and slippery also stranger danger stops me walking more
- It's quicker to drive to the location when on a small timescale

Cycling and walking more

Experienced and regular cyclists identified the following as ways to encourage people to walk and/or cycle more:

- We need safer and more direct routes parallel to main transport corridors. Secure bike parking at my destination along with showers at my workplace to allow for longer commutes would encourage me to cycle more. More space on trains to take my bike when commuting or work related trips would also help.
- We should copy the infrastructure of most other European countries. They have proper planning, route segregation, and connected infrastructure. Busses in Canada have cycle racks, which is essential in my opinion. You also shouldn't need to book a bike onto a train.
- I would definitely love to cycle more if there were more separate routes. Not just a silly red strip in the gutter. Holland, Denmark, Sweden etc. do it brilliantly so wouldn't it be great if wales could show the way in the UK!
- I would like the ability to take my bike on public transport - it can be very difficult on trains and is impossible on a bus
- If there were protected routes to take the kids to school I would sell my car. If I could cycle to work via shops rather than back routes I would do shopping on bike too

All other adult respondents who didn't identify as experienced and regular cyclists, identified the following as ways to encourage people to walk and/or cycle more:

- Regarding walking we need well-maintained paths with safer access to cross the road and more Zebra Crossings.
- I would like footpaths to remain for the use of people on foot. Where routes become joint cycle/foot paths, I feel insecure and endangered.
- We need better lit routes and dedicated cycling routes akin to those we use in Europe. Berlin has a great network, we cycled there with 4 kids aged 3 to 15 with no concerns about safety on the routes or the security of the bikes went left

Young people identified the following as ways to encourage people to walk and/or cycle more:

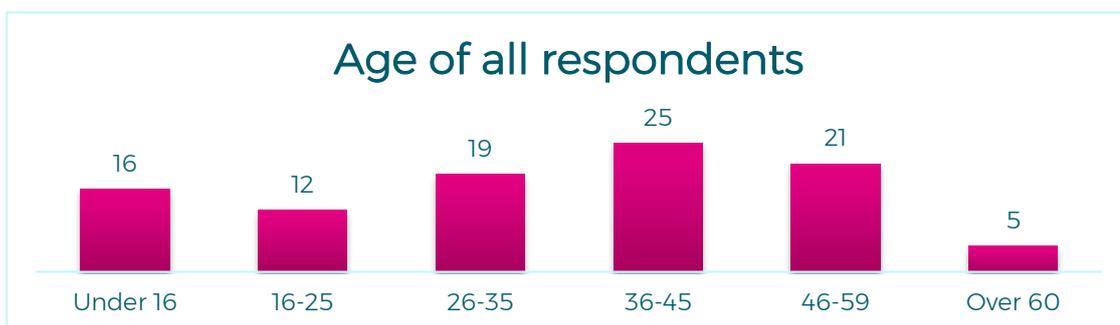
- If I had friends who walk or ride a bike living near me I would cycle or walk more
- I'd like safer roads with more crossings
- My Mum can't afford to buy a bike, we could have charity to help children afford a bike
- If the roads had pavements and it could be safer by building roads further away from the pavement

Demographic of respondents

Location of respondents

- **38%** of all survey respondents came from Cardiff with **13%** from Swansea.
- **54%** of active travellers came from Cardiff, **17%** from Swansea and **6%** from Newport
- Between **36%** and **45%** of all other adult travellers came from Cardiff with the second largest local authority response coming from Swansea with **17%** for both those who do not ride but would like to and new or returning cyclists.
- Surveys with young people were completed through school visits facilitated by the Education and Youth Engagement Team. The largest response was from Monmouthshire with **19%**, followed by Bridgend with **18%**, Conwy with **17%** and Denbighshire with **12%**

Age



- **32%** of active travellers identified as 36-45, **27%** identified as 26-35 and **23%** identified as 46-59
- **36%** of all other adult identified as from the 36-45 age group, with **24%** from the 46-59 age group

Gender

- All respondents identified as **58%** male and **42%** female
- Active travellers identified as **70%** male and **30%** female
- Young people identified as **48%** male and **52%** female
- However, all other respondents identified as **40%** male and **60%** female

- The most significant difference was within the group who identified as those who do not want to cycle, with **30%** male and **70%** female

Ethnic group

All adult respondents identified as **96%** white, with young people identifying as **94%** white

Disability

- Of all respondents **91%** identified as not having a disability. Of those who identified as having a disability **28%** categorised as having a physical disability, **26%** a mental health disability and **26%** a learning disability.
- **94%** of active travellers identified as not having a disability. Of those who identified as having a disability **33%** categorised as having a physical disability and **28%** a mental health disability.
- **91%** of all other respondents identified as not having a disability. Of those who identified as having a disability **34%** categorised as having a medical condition.
- **88%** of young people identified as not having a disability. Of those who identified as having a disability **40%** categorised as having a learning disability and **24%** a physical disability.

Active travel survey questions

1. Do you own a bike?

Cycling

2. How often and where do you ride a bike?

Respondents were asked to identify the frequency they cycled to work, college or university, school, shopping and personal business and leisure

3. How do you rate cycle routes in your area?

Respondents were asked to rate the number, directness, condition and safety of cycling routes

Walking

4. How often and where do you walk?

Respondents were asked to identify the frequency they walked to work, college or university, school, shopping and personal business and leisure

5. How do you rate walking routes in your area?

Respondents were asked to rate the number, directness, condition and safety of walking routes

Safety and security

6. How safe do you feel using the following modes of transport?

Respondents were asked to rate the safety of driving, cycling, walking and public transport

7. If you ride a bike, how good is the security of bicycle parking you use?

Barriers and perceptions

8. In terms of cycling, how would you describe yourself?

- I do not want to ride a bike
- I do not ride but would like to
- I occasionally ride a bike

I'm new or returning to bike riding

I'm an experienced regular bike rider

9. What are the main barriers to cycling more often?

10. What are the main barriers to walking more often?

11. What would encourage you to walk and/or cycle more often?