

Walking Survey 2021 (Survey Report)



Prepared for



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Key messages and survey overview



Key messages



Walking forms a significant part of survey participants' lives

- Walking is a key form of transport, recreation and exercise in Victoria with:
 - More than 50% of survey participants walking at least four days a week
 - Most (63%) spending between 15 and 60 minutes walking each day on average
- Most (at least 73%) rely on walking for at least some of their transport trips, with 29% relying on walking for most or all of their trips
- Compared to both before the pandemic and since the last lock down a greater proportion of Victorians are spending more time walking (net increase of around 10%)
- Survey participants are motivated to walk for a range of reasons, but key reasons are:
 - Exercise and health (65%)
 - Personal wellbeing (49%)
 - Transport (to go to the shops, cafes and entertainment, 47%)

However, various barriers (in addition to the weather- and weather-related factors such as shade) make it difficult for people to walk in their local area

- Nearly all survey participants identified at least one barrier to walking
- Key barriers identified by survey participants were:
 - Poorly maintained footpaths (a slight or significant problem for 59% of all survey participants)
 - Difficulties crossing main roads (a slight or significant problem for 55% of all survey participants)
 - Too much traffic (a slight or significant problem for 52% of all survey participants)
 - Traffic moving too fast (a slight or significant problem for 51% of all survey participants)



Key messages continued



Livable neighbourhoods encourage people to walk

- Survey participants who live in 20-minute neighbourhoods are more likely to:
 - Walk to go shopping (70%) than those who live more than those who live further away (54% of those who live between 800 metres away and 1.6 kilometres away and 36% of those who live more than 1.6 kilometres away)
 - Have a safe walking route to the shops (95%) than those who live more than those who live further away (87% of those who live between 800 metres away and 1.6 kilometres away and 60% of those who live more than 1.6 kilometres away)
- A majority of survey participants value:
 - Having access to good public transport (70% - 4 or 5 out of 5 on importance)
 - Having a positive impact on the environment by walking/bike riding/using public transport more (69% - 4 or 5 out of 5 on importance)
 - Living somewhere that reduces their need to use a car to get around (67% - 4 or 5 out of 5 on importance)
 - Being able to do most of what they want to do within 20-minute walk from home (work, shop etc.) (66% - 4 or 5 out of 5 on importance)

Survey participants would be more likely to walk in their local area if the key barriers to walking were addressed

- Three quarters of survey participants (75%) identified a wide range of incentives that would encourage them to walk more in their local area – and most commonly they commented on the poor condition of footpaths (including their absence, too narrow, and they need to be better maintained)
- When prompted 89% of survey participants identified at least one factor that would encourage them to walk more in their local area

Survey participants support support government action and investment to make walking easier in their local area

- A majority of survey participants believe the government should provide pedestrian crossing facilities, traffic calming and/or adjust traffic lights (where applicable) to make it safer and easier to cross the road to get to shops (75% agree or strongly agree), schools (72% agree or strongly agree), railway stations (67% agree or strongly agree) and tram or bus stops (64% agree or strongly agree)
- Most survey participants believe the government should introduce lower speed limits to make walking easier, particularly on main roads (54% agree or strongly agree), and in typical residential streets (reduce to 40 kilometre speed limit) (55% agree or strongly agree)



Survey overview



Survey overview



In August 2021, Victoria Walks commissioned Bartley Consulting to gather sound evidence of the Victorian community's interest, the perceived benefits and barriers to walking and community support for increased State Government action and investment in walking.

The research findings are intended to help Victoria Walks represent walkers including seeking election commitments consistent with the community's walking needs, interests and expectations.

The survey objectives were as follows:

- Identify and quantify the motivations (positive and negative attributes) for walking
- Identify and quantify the barriers to walking (physical and other risks)
- Establish the triggers that would increase the number of people who are walking and the frequency of walking
- Understand the impact of COVID-19 on short-term walking and the likelihood of this being sustained
- Quantify community support for different options for increased investment to address barriers to walking
- To identify similarities and differences according to where Victorians live, their age and gender, and mobility

A total of 2,372 Victorians aged 18+ completed the survey (see page 8 for details of survey methods)

- Throughout the report the total sample results are shown, and as appropriate comparisons between the total sample results and the panel sample are provided

1. Victorians aged 18 or over, including those who do and do not identify themselves as “walkers” and people with disability



Who was surveyed



All Victorians aged 18+ were eligible to participate in the survey

To deliver the survey cost effectively and ensure the sample was both representative and sufficiently large to meaningfully compare groups of survey participants, a dual methodology was adopted:

1. A representative sample was achieved by surveying members of a commercially sourced online survey panel

- This sample of 809 Victorians aged 18+ is representative with respect to age, gender and Melbourne vs regional Victoria
- There is no reason to suspect any bias in relation to walking, and as such the results from this sample provide important contextual information about the frequency of walking
- The online Panel Survey data collection commenced on Friday 12 November 2021 and concluded on Thursday 18 November 2021, allowing time for the community to resume or establish new patterns of behaviour, emerging from Victoria's sixth COVID-19 lockdown

2. The sample size was boosted through targeted surveying, managed by Victoria Walks

- Victoria Walks promoted the survey through a range of channels including:
 - Distributing the survey link via its community engagement platforms, and social media
 - Emailing an online survey link to its local government supporters, the RACV and other supporters
- Victoria Walks advertised the survey on social media including paid Facebook advertising, as well as via its own Facebook page
- 1,563 eligible Victorians (i.e. they were aged 18+) completed the survey through one of the above channels
- This survey was open from 17 November 2021 to 16 December 2021

A total of 2,372 Victorians aged 18+ completed the survey via one of the above methods



Sample comparison



- Although there is some self-selection (as survey participation is optional) the panel sample broadly represents the age, gender and location (live in Melbourne or regional Victoria) characteristics of Victorians aged 18+
- The targeted sample does not exhibit the same characteristics but serves to increase the overall sample size for the purpose of this survey
- Comparing the panel sample and the targeted sample:
 - Gender is better balanced in the panel sample (54% females – 64% across the total sample)
 - The spread by age is similar although people aged over 70 are under-represented in the total sample (5% compared to 12% of the panel sample)
 - Panel sample members are less likely to be frequent walkers (53% compared to 66% of the total sample)
 - 31% of the panel sample is from regional Victoria (25% of the total sample)
- The differences are not surprising, given the targeted sampling strategy did not control for age, gender or location and the survey would have a greater appeal to people with an interest in walking
- While these differences are notable, it is reasonable to combine the two samples on the basis that they collectively represent the views of 2,372 Victorians with an interest in walking and we have not made any inferences from the combined sample about Victorians overall



Walking among survey participants



What proportion of survey participants are frequent walkers to get to specific places, train stations and/or recreation?



From the **panel survey**, being a representative sample of Victorians aged 18+ ...

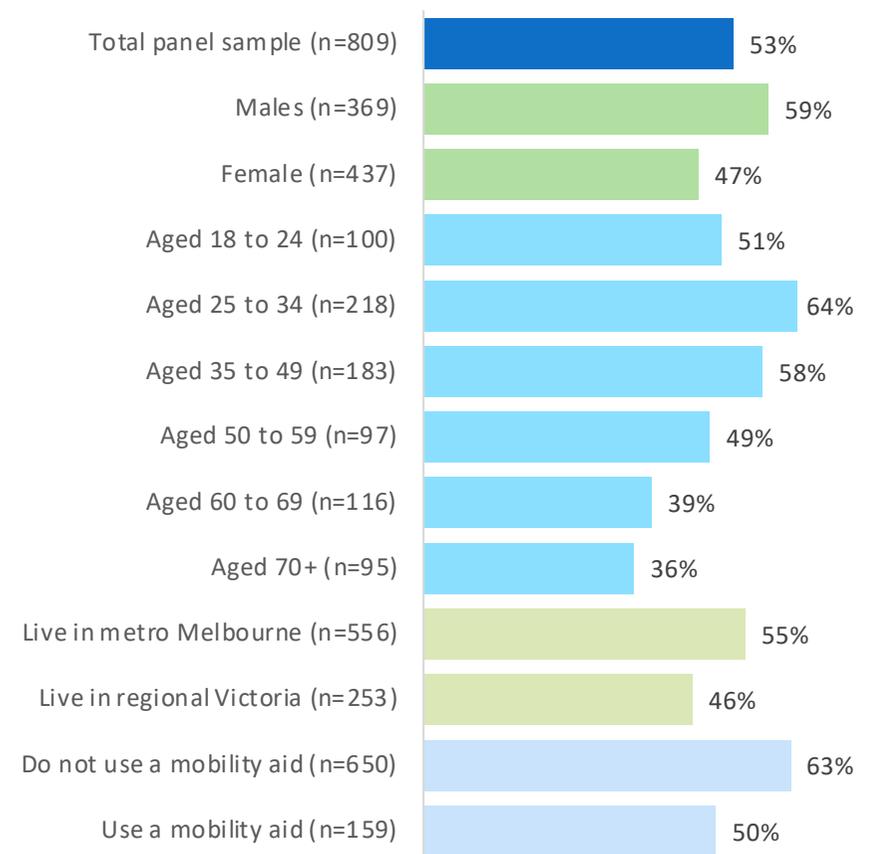
- **53% are walking at least four days a week for at least one of the following reasons:**
 - To get to specific places, such as work, education, entertainment or to see a friend
 - To get to a train station
 - For recreation
- Those **most** likely to be frequent walkers are:
 - Male (59%)
 - Aged 25 to 34 (64%)
 - Living in Melbourne (55%)
 - Not using a mobility aid (63%)
- While comparatively less likely to walk, significant proportions of females (47%), those aged 70+ (36%), those living in regional Victoria (46%) and people who use a mobility aid (50%) walk regularly

In the remainder of this report “frequent walkers” refers to those survey participants who walk at least four days a week for at least one of the reasons above

“Less frequent walkers” are those who walk less than four days a week

In the last week, how many days did you walk ... to get to specific places such as work, to get to a train station and/or specifically for recreation?

Panel survey members who walked 4+ days





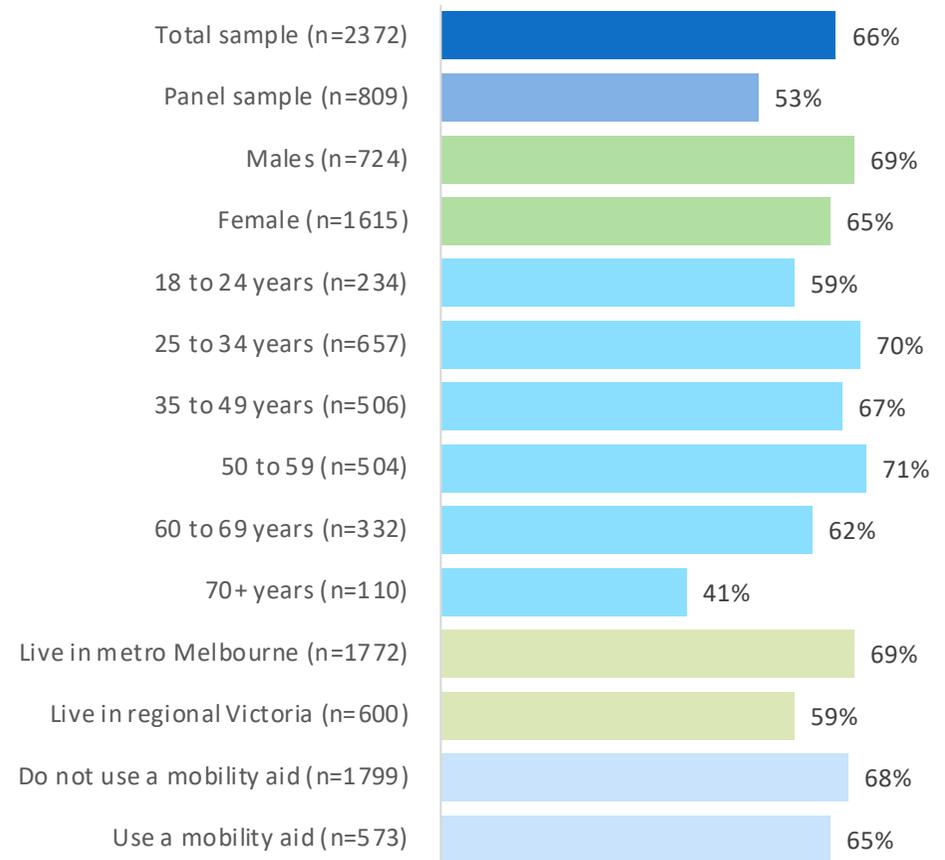
What proportion of survey participants are frequent walkers to get to specific places, train stations and/or recreation?



- Among the **total sample**, 66% walk at least four days a week for at least one of the following reasons:
 - To get to specific places such as work, education, entertainment or to see a friend
 - To get to a train station
 - For recreation
- This proportion is greater than the 53% among the panel sample and is as expected given the broader survey promotion had greater appeal to walkers (as indicated by the 39% who were aware of Victoria Walks compared to 22% of the panel survey sample)
- While the overall proportion of frequent walkers is larger among the total sample, the comparative results are consistent; i.e. among the total sample **most** likely to be frequent walkers are:
 - Aged 25 to 34 (70%) and aged 50 to 59 (71%)
 - Living in Melbourne (69%)
- Similarly, among the total sample, while comparatively slightly less likely to walk, the majority of participants from regional Victorian (59%) are frequent walkers, as are those who use a mobility aid (65%). A significant proportion of those aged 70+ (41%) are also identified as frequent walkers.

In the last week, how many days did you walk ... to get to specific places such as work, to get to a train station and/or specifically for recreation?

Total sample who walked 4+ days





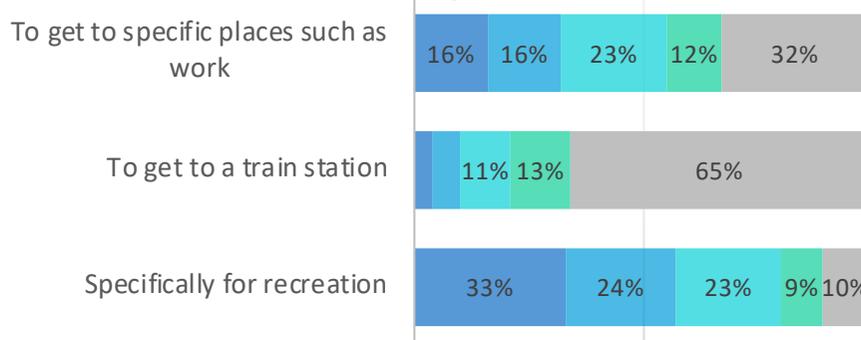
How often are people walking, and why?



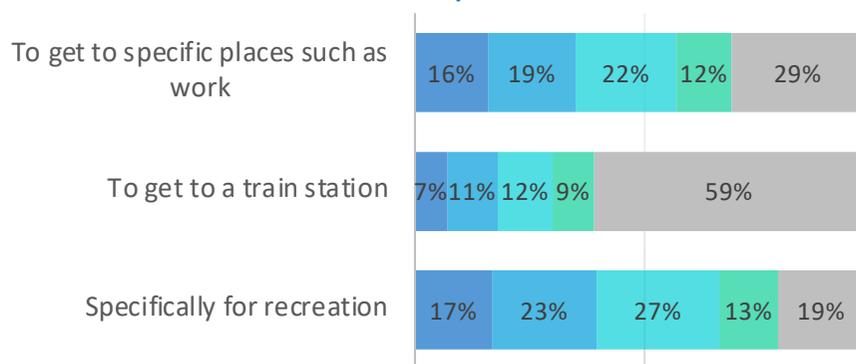
In the last week, how many days did you walk ...?

- Nearly every day (6 or 7 days)
- Most days (4 or 5 days)
- Some days (2 or 3 days)
- One day
- No days
- Can't recall

Total sample n=2,372



Panel sample n=809



With reference to the total sample results, most commonly survey participants are:

- **walking at least four days a week specifically for recreation (57%)**
 - 64% of those aged 50 to 59 compared to 38% of those aged 70+
 - 59% of those who live in Melbourne compared to 51% of regional Victorian participants
 - 57% of those who use a mobility aid are walking at least four days a week for recreation
- **walking at least four days a week (32%) to get to specific places such as work**
 - 38% of males compared to 29% of females
 - 39% of those aged 25 to 34 compared to 25% of those aged 70+
 - 33% of those who live in Melbourne compared to 29% of regional Victorian participants
 - 31% of those who use a mobility aid compared to 36% of those who do not use a mobility aid
- As Victorians emerged from their sixth COVID-19 lockdown, and with many Victorians who are continuing to work from home, only 10% of survey participants were walking to get to a train station on most days of the week

The total sample results are generally consistent with the panel sample results, although the total sample includes a greater proportion of Victorians who are walking for recreation

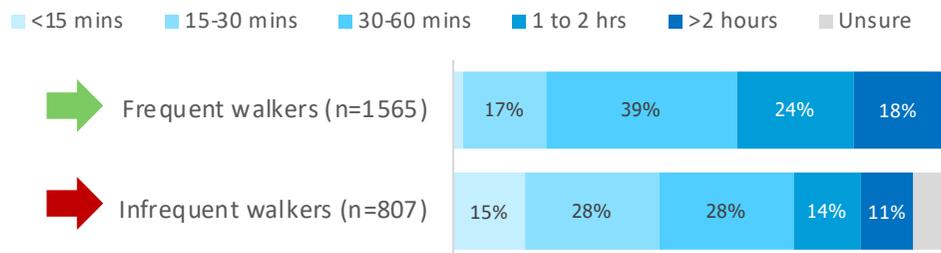


How much time do survey participants spend walking?

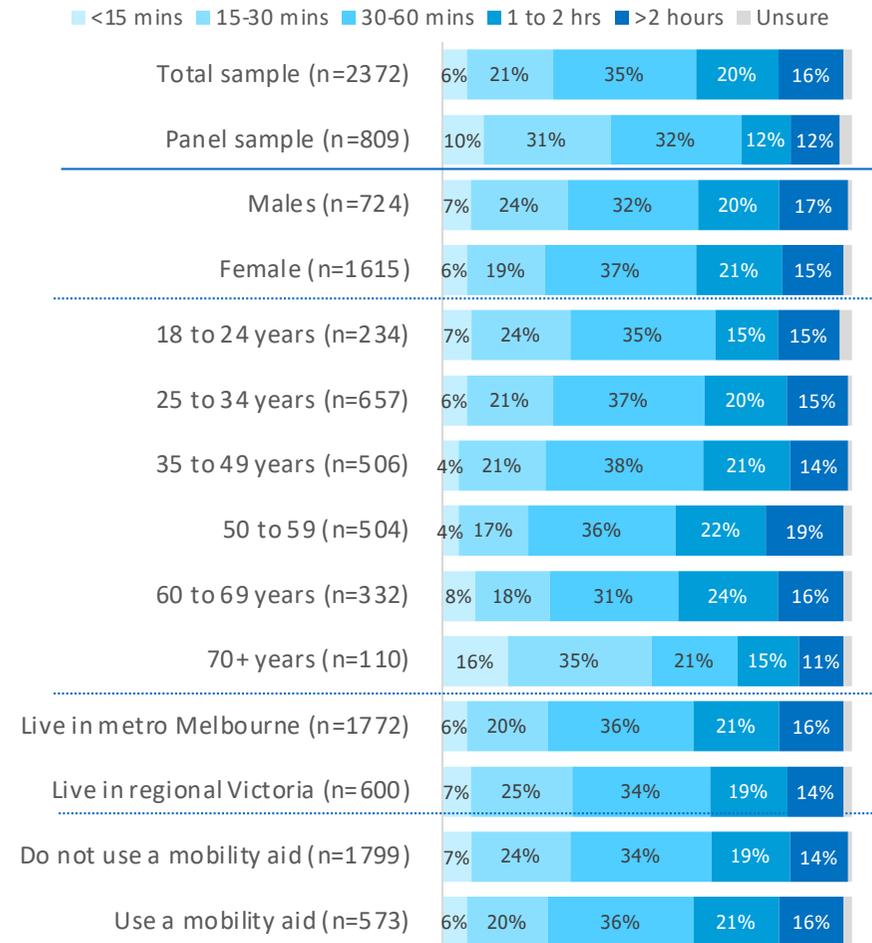


- Based on the **panel survey** results **most survey participants (63%) spend between 15 and 60 minutes walking each day on average**, with limited variability between males and females, by age location or mobility
- Unsurprisingly, frequent walkers (those who walk at least four days a week for any purpose) are also more likely to walk for more time per day than infrequent walkers
- Notably, 25% of people who walk less than four days a week (infrequent walkers) walk for at least an hour a day on average on they days they do walk

Thinking about the last week, how much time did you walk (including using a mobility aid) each day on average, for any purpose?



Thinking about the last week, how much time did you walk (including using a mobility aid) each day on average, for any purpose?





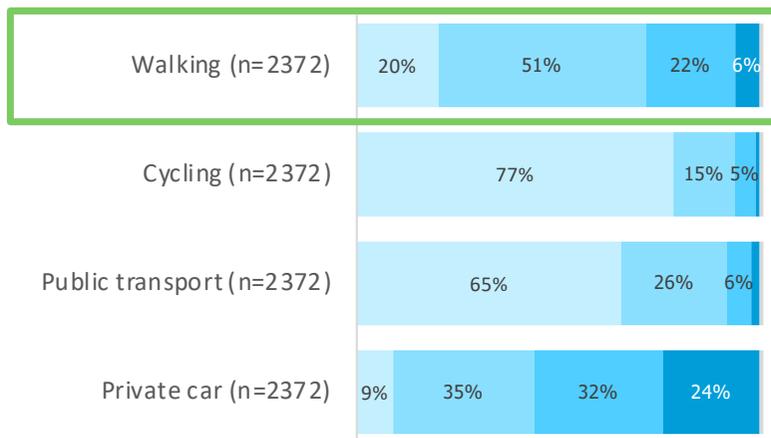
How important is walking for transport?



- Although most survey participants (90%) rely on their car for at least some of their transport trips ...
 - Among the **total sample**, at least three quarters of those surveyed rely on walking for at least some of their transport trips (**78%**)
 - **28% rely on walking for all or most of their trips**
- Those who are most likely to rely on walking for all or some of their trips are:
 - Male (35%)
 - Those aged 25 to 34 (30%)
 - As expected, frequent walkers (37%)

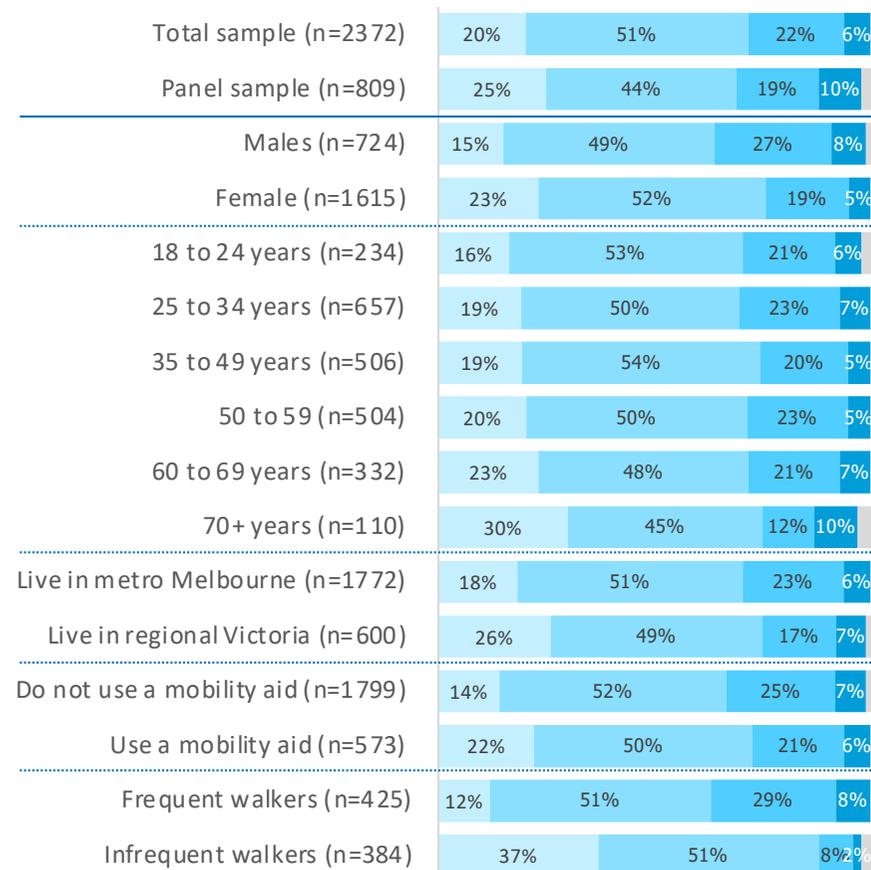
To what extent did you rely on the following forms of transport to get around in the last week?

■ No trips ■ Some trips ■ Most trips ■ All trips ■ Unsure



To what extent did you rely on [walking] to get around in the last week?

■ No trips ■ Some trips ■ Most trips ■ All trips ■ Unsure





How has the pandemic affected the time spent walking?



On balance greater proportions of survey participants are now walking compared to either before the pandemic or during the most recent lockdown, with 24% more walking now compared to before the pandemic and 15% more compared to during the most recent lockdown (total sample results)

How has the total time you spend walking for any purpose changed comparing now to ...

Before the pandemic?

	Decreased	No change	Increased	Net increase
Total sample (n=2372)	17%	41%	41%	24%
Panel sample (n=809)	18%	52%	28%	10%
Males (n=724)	16%	49%	34%	18%
Female (n=1615)	17%	37%	43%	26%
18 to 24 years (n=234)	24%	33%	40%	16%
25 to 34 years (n=657)	19%	33%	44%	25%
35 to 49 years (n=506)	15%	39%	45%	30%
50 to 59 (n=504)	13%	41%	44%	31%
60 to 69 years (n=332)	14%	55%	29%	15%
70+ years (n=110)	15%	67%	15%	0%
Live in metro Melbourne (n=1772)	16%	38%	44%	28%
Live in regional Victoria (n=600)	19%	48%	31%	12%
Do not use a mobility aid (n=1799)	17%	39%	42%	25%
Use a mobility aid (n=573)	16%	41%	40%	24%
Frequent walkers (n=425)	12%	40%	46%	34%
Infrequent walkers (n=384)	25%	42%	29%	4%

During the most recent lockdown?

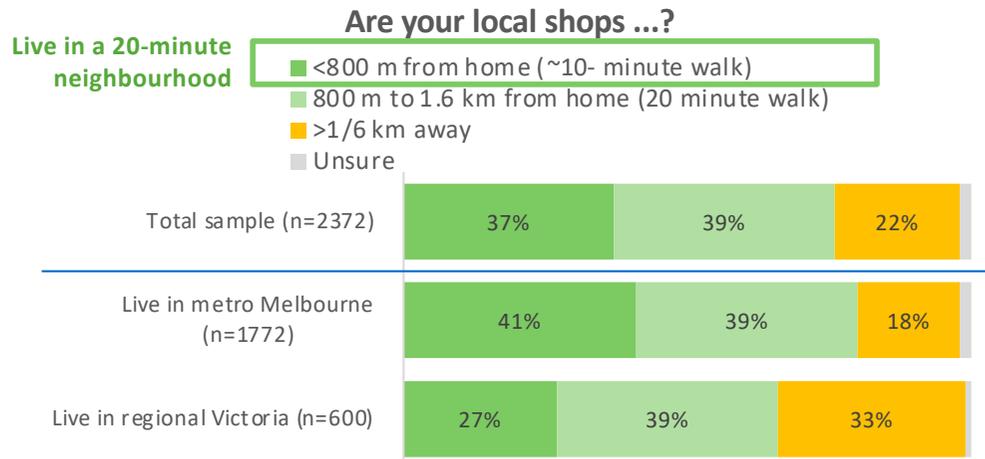
	Decreased	No change	Increased	Net increase
Total sample (n=2372)	20%	44%	35%	15%
Panel sample (n=809)	23%	42%	34%	11%
Males (n=724)	18%	46%	35%	17%
Female (n=1615)	20%	43%	35%	15%
18 to 24 years (n=234)	27%	35%	36%	9%
25 to 34 years (n=657)	21%	36%	41%	20%
35 to 49 years (n=506)	19%	42%	37%	18%
50 to 59 (n=504)	15%	52%	32%	17%
60 to 69 years (n=332)	17%	55%	28%	11%
70+ years (n=110)	25%	54%	21%	-4%
Live in metro Melbourne (n=1772)	19%	42%	38%	19%
Live in regional Victoria (n=600)	22%	49%	28%	6%
Do not use a mobility aid (n=1799)	23%	42%	34%	11%
Use a mobility aid (n=573)	18%	45%	36%	18%
Frequent walkers (n=425)	14%	46%	39%	25%
Infrequent walkers (n=384)	30%	40%	27%	-3%



20-minute neighbourhoods and walking



Who lives in a walkable neighbourhood?



Survey participants who live ... from their local shops	Less than 800 metres (n=872)	Between 800 metres and 1.6 km (n=955)	More than 1.6 km (n=524)
Have local shops located along a street, facing the footpath and road	50%	35%	24%
Live in metro Melbourne	83%	77%	57%
Relied on walking for at least some trips	88%	79%	62%
Walk to go to the shops, cafes or for entertainment	70%	54%	36%
Have a safe walking route to the shops	95%	87%	60%
Does not take too long to walk (to shops, school etc.)	68%	53%	30%
Frequent walkers	72%	67%	56%

The Victorian Government defines a 20-minute neighbourhood as 800 metres from activity centres (a 20-minute round trip).

Among the total sample

- Around 4 in 10 Melbournians live in a 20-minute neighbourhood (41%)
- Only around a quarter of regional Victorian survey participants (27%) live in a 20-minute neighbourhood

Comparing survey participants who live or do not live in a 20-minute neighbourhood, **those who live in a 20-minute neighbourhood are relatively more likely to:**

- Have shops located along a street facing the footpath and road (50%)
- Live in Metropolitan Melbourne (83%)
- Rely on walking for at least some of their trips (88%)
- Walk to go shopping (70%)
- Have a safe walking route to the shops (95%)

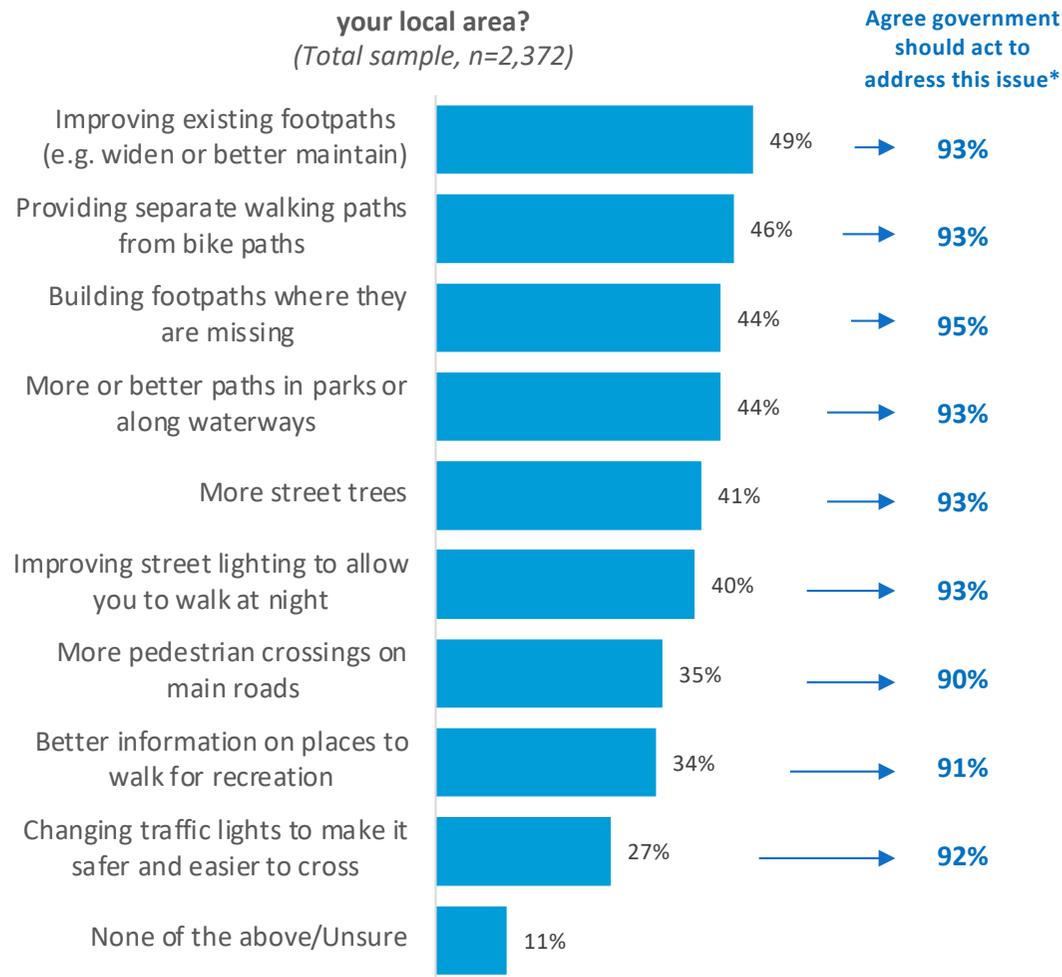
... which support a positive relationship between living in a 20-minute neighbourhood and being a frequent walker (72%)



What would encourage Victorians to walk more in their local area and support for government action



Which of the following would help you walk more in your local area?
(Total sample, n=2,372)



Nearly all survey participants believe a combination of actions to walk more in their local area (89%) - with most mentioning two or three incentives

The key incentives (from the total sample) are:

1. Improving footpaths (49%)
2. Providing separate walking paths from bike paths (46%)
3. Building footpaths where they are missing (44%), and particularly for
 - Regional Victorian participants (57%)

Most survey participants who identified particular issues expect the government to take actions to address those issues to make it easier for people to walk in their local area

* Survey participants who identified a particular issue, such as improving footpaths, were asked to indicate the extent they agree or disagree that the government should address the issue to help make walking easier in their local area. The figures shown are the percentage of those who identified the issue who agreed or strongly agreed.



Motivations and barriers to walking



Where does walking fit into lifestyle priorities?



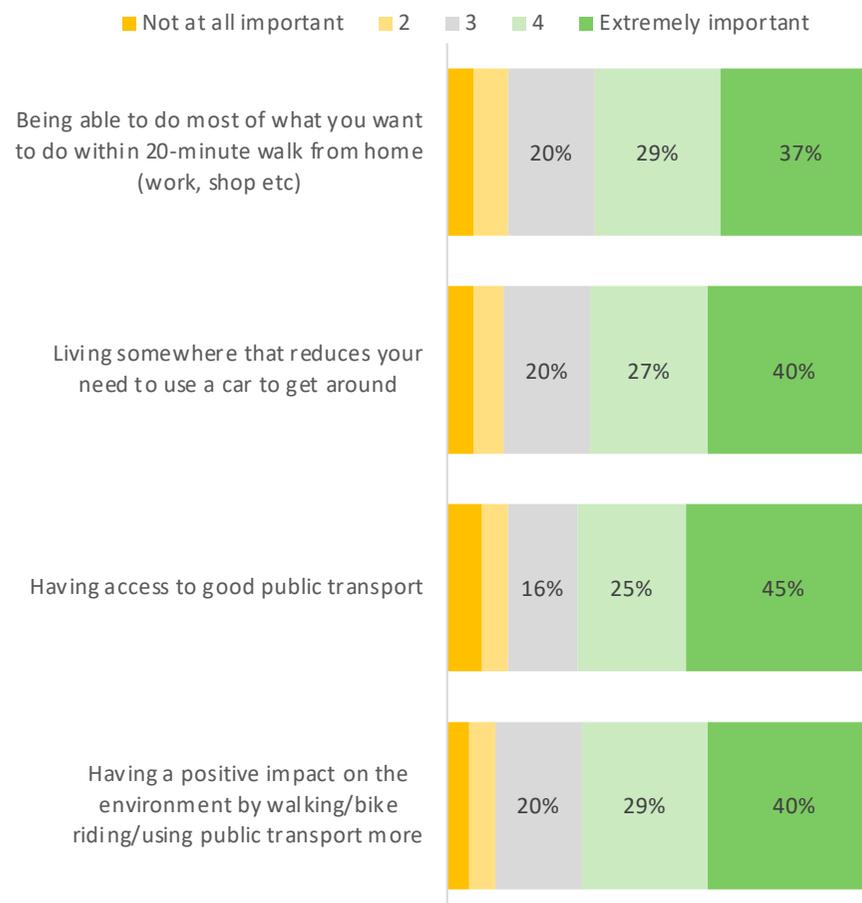
From the **total sample**, a majority of Victorians value:

- Having access to good public transport (70% - 4 or 5 out of 5 on importance)
- Having a positive impact on the environment by walking/bike riding/using public transport more (69% - 4 or 5 out of 5 on importance)
- Living somewhere that reduces their need to use a car to get around (67% - 4 or 5 out of 5 on importance)
- Being able to do most of what they want to do within 20-minute walk from home (work, shop etc.) (66% - 4 or 5 out of 5 on importance)

Survey participants who are most likely to hold these values are:

- Aged 35 to 49
- Live in Melbourne
- Do not use a mobility aid
- Frequent walkers

How important are the following to you?
(Total panel sample, n=2,372)





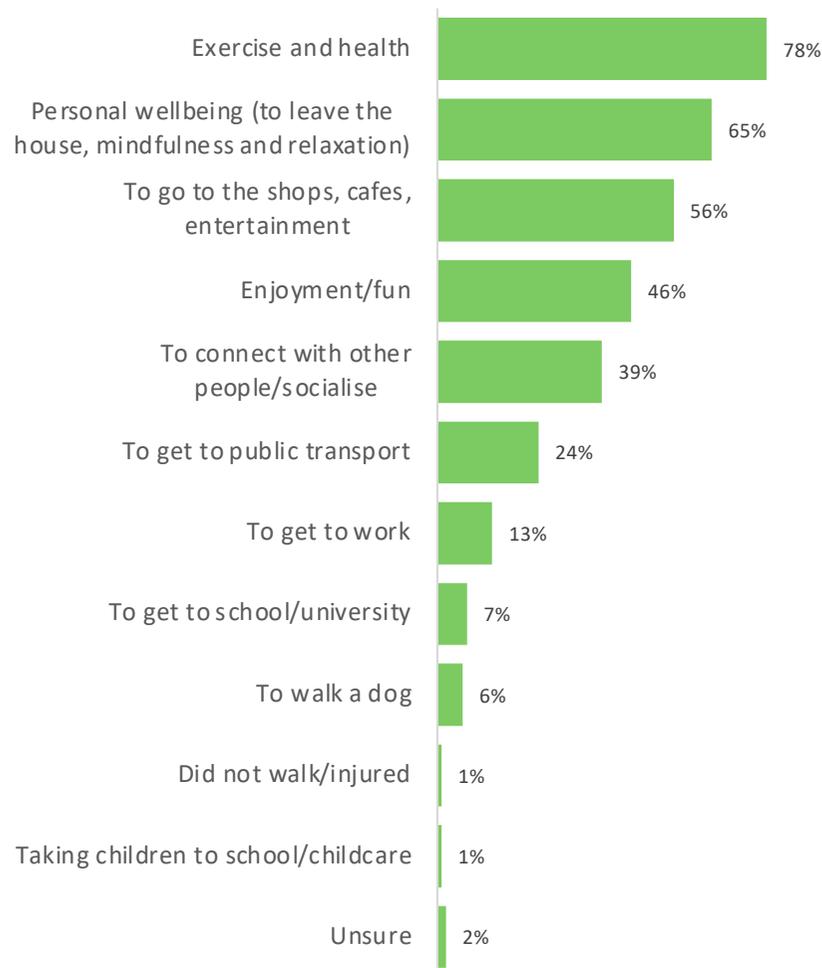
What motivates survey participants to walk?



From the **total sample**, the three key factors that motivate survey participants to walk are:

1. Exercise and health
 - Especially survey participants aged 35 to 49 (82%) and frequent walkers (84%)
 - Least likely to be Victorians aged 70+ (64%)
2. Personal well-being
 - Especially frequent walkers (72%)
 - Least likely to be survey participants aged 60+ (39%)
3. To go to the shops, cafes and entertainment
 - Especially males (60%) and frequent walkers (61%)
 - Least likely to be aged 70+ (42%)

For what purposes have you walked in the past week?
(Total sample, n=2,372)

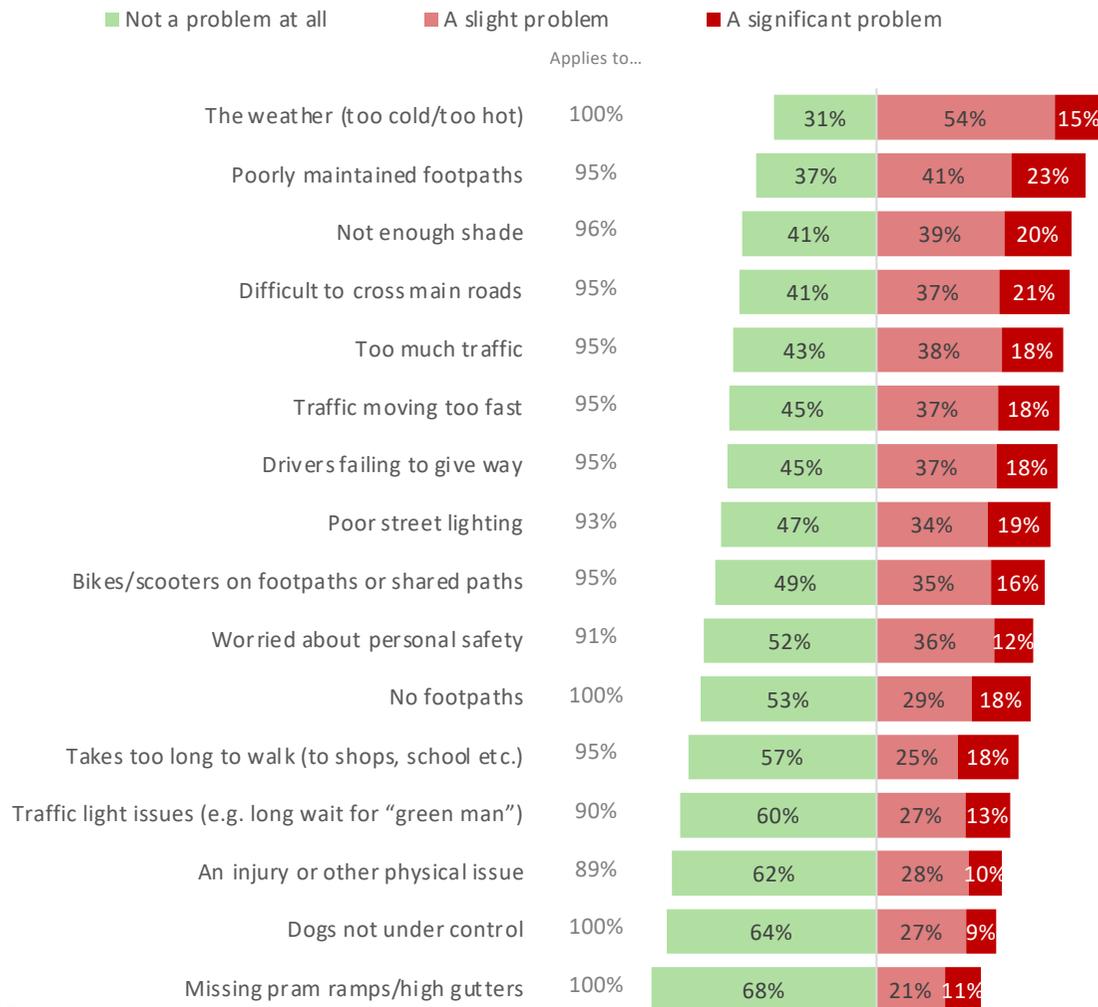




What deters survey participants from walking?



To what extent do the following make it difficult for you to walk in your local area? (Total sample, n=2372), base varies by the “applies to” percentage*)



- From the **total sample**, nearly all Victorians have one or more of issues impacting on their ability to walk in their local area
- The weather is the most frequently mentioned factor making it difficult for survey participants to work in their local area
 - However, the weather per se is not a controllable factor or one authorities can influence
- **The most frequently mentioned walking infrastructure factors making it difficult for survey participants to walk in their local area relate to:**
 - Poorly maintained footpaths
 - Not enough shade
 - Difficulties crossing main roads/too much traffic/traffic moving too fast/drivers failing to give way
 - Poor street lighting
- Other key issues are:
 - It takes too long to walk (to shops, school etc.) - most impacted are those who use a mobility aid (23% mentioned this as a significant problem)

* Survey participants who answered “not applicable” to the issue were excluded from the analysis.



What would encourage Victorians to walk more in their local area?



From the **total sample**, one in five (25%) of survey participants did not identify any incentives to encourage them to walk more in their local area – many indicated they were already walking a lot

Three quarters of survey participants (75%) identified a wide range of incentives that would encourage them to walk more in their local area

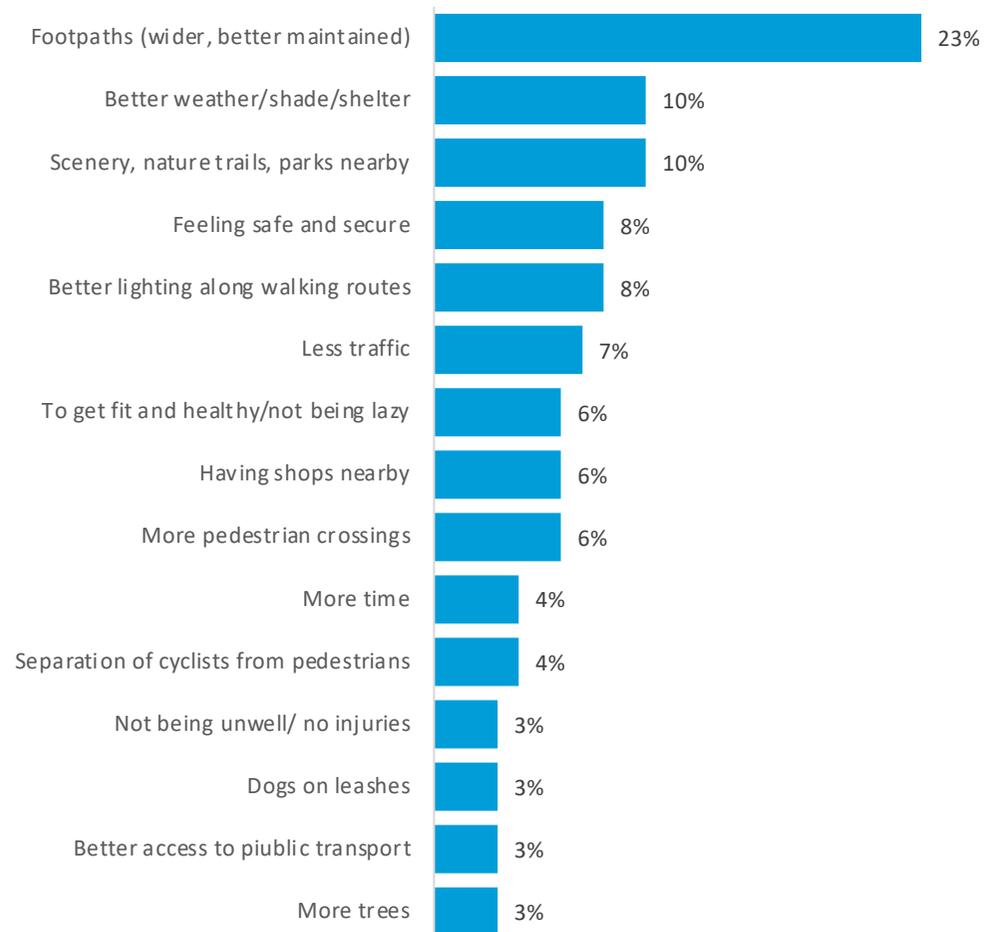
Key mentions by theme, with sample verbatim comments were:

1. To get fit and healthy/not being lazy (14%)
 - *"For my healthy routine"*
 - *"Personal motivation"*
 - *"Me being less lazy"*
2. New, more, wider, better maintained footpaths (23%)
 - *"Walking footpaths"*
 - *"Better maintained footpaths"*
 - *"Improved maintenance of footpaths."*
 - *"Wider footpaths"*
3. Better weather/shade/shelter (9%)
 - *"Trees for shade"*
 - *"Better weather"*
 - *"Sunny days"*
4. Scenery, nature trails, parks (attractive places to walk) (8%)
 - *"More walking trails with nature"*
 - *"More parklands"*
 - *"More picnics and nature playgrounds"*

What would encourage you to walk more in your local area?

(Total sample, n=2,372)

Coded responses to open-ended question*



* Factors mentioned by less than 3% of survey participants are not shown



Support for government investment to encourage more walking



Do survey participants support government investment to make crossing roads easier?



From the **total sample**, a majority of survey participants believe the government should provide pedestrian crossing facilities, traffic calming and/or adjust traffic lights (where applicable) to make it safer and easier to cross the road to get to:

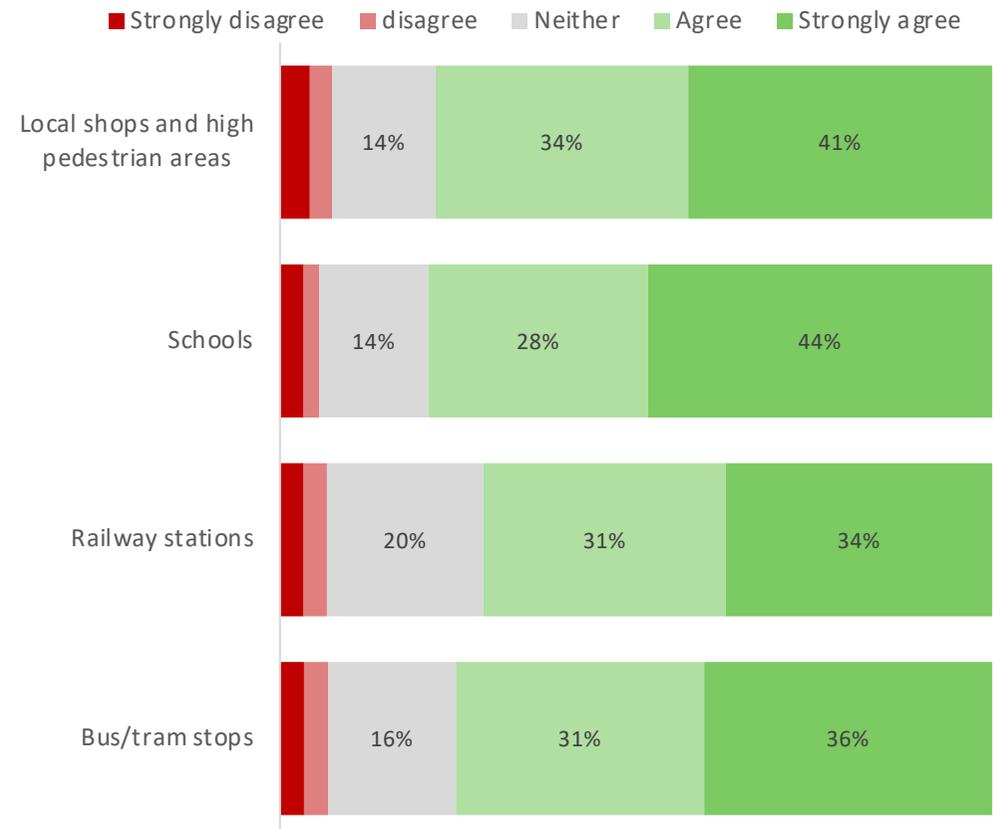
- Shops (75% agree or strongly agree)
- Schools (72% agree or strongly agree)
- Tram/bus stops (67% agree or strongly agree)
- Railway stations (64% agree or strongly agree)

Survey participants who are most likely to agree with the above:

- Are most likely to be female (in relation to shops and schools)
- Are most likely to be aged between 25 and 34
- Live in Melbourne
- Do not use a mobility aid
- Are frequent walkers

To what extent do you agree or disagree the government should provide pedestrian crossing facilities, traffic calming and/or adjust traffic lights (where applicable) to make it safer and easier to cross to get to the following in your local area?

(Total sa





Do survey participants support lower speed limits on roads to make walking easier?



From the **total sample**, most survey participants believe the government should introduce lower speed limits to make walking easier:

- Safer speeds on main roads (54% agree or strongly agree)
- 40-kilometre speed limit in typical residential streets (55% agree or strongly agree)
- 30-kilometre speed limits in busy shopping areas (46% agree or strongly agree)
- 30-kilometre speed limits around schools (47% agree or strongly agree)

However only 32% agree or strongly agree with introduction of 30-kilometre speed limits in quiet residential streets (to make walking easier)

survey participants who are most likely to agree with the above suggested measures:

- Are most likely to be male
- Aged between 25 and 34
- Do not use a mobility aid
- Are frequent walkers

To what extent do you agree or disagree that the government should introduce the following to help make walking easier?

(Total sample, n=2,372)

