

# National survey of attitudes and barriers to walking in Scotland

August 2019



paths  
for all

FOR A HAPPIER,  
HEALTHIER SCOTLAND



56°  
DEGREE  
INSIGHT

Undertaken by 56 Degree  
Insight for Paths for All

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# Introduction

## Introduction

Paths for All work with a number of partner organisations to deliver the Scottish Government's National Walking Strategy – Let's get Walking. Their vision is for Scotland to become one of the world's most walking friendly countries with everyone benefitting from walking, everyday in welcoming and safe environments.

Paths for All's work is central to the delivery of the strategy: promoting everyday walking through a wide range of activities from supporting community path and active travel projects to the promotion of places for recreational walking.

Paths for All commissioned 56 Degree Insight to undertake their 2019 National Survey. The survey has provided an updated picture of the Scottish adult population's participation and attitudes to walking, updating information last collected in 2014 and complementing other sources of information such as the Scottish Household Survey and Scotland's People and Nature.

Specifically the study sought to answer the questions listed on the right.

### Everyone...

- How does walking participation vary across the population?
- What motivates different population groups to walk?
- Do the barriers that reduce participation vary across the population?
- How to increase levels of walking participation amongst target groups?
- In general how do behaviours and attitudes vary by demographic and geography? (age, gender, ethnicity, employment status, car ownership, household income, SIMD, rurality)

### Everyday...

- To what extent is walking included in everyday routines?
  - Going to work
  - Going to school
  - Shopping
  - Using public transport
  - Visiting friends or family
  - Dog walking
- What is the relationship between walking and other modes of transport?

### Everywhere...

- What types of place/ environment do the Scottish population walk in?
- How accessible to home are the places that could be walked to
- To what extent is convenience a factor when deciding to walk or drive?



## Survey method

The survey fieldwork was undertaken using Kantar's monthly online omnibus survey Onlinebus Scotland.

Onlinebus Scotland provides a fast and cost-effective way to reach the Scottish population. Backed up by Kantar's quality assured data collection methods, Onlinebus Scotland focuses on delivering quick, accurate and affordable insights. Features include:

- A monthly quick turnaround survey of a representative sample of 1,000 online Scottish adults aged 16+
- Representative of online adults aged 16+.
- Sample is drawn from Kantar's panel of c.30,000 adults in Scotland who have agreed to take part in regular online surveys in different topics.
- Quota controls are used to obtain a representative sample distribution.
- The data is weighted to match Scottish population profile estimates.
- The online approach allows for respondents to provide vox pop responses, an approach used in this study.

Fieldwork was undertaken from 14<sup>th</sup> to 21<sup>st</sup> June 2019 with a total of 1,001 interviews completed.

Please note the following points when using the survey results:

- Any trends or variations between results highlighted in the text are statistically significant unless stated otherwise.
- Responses to all questions are reported as claimed by the nationally representative sample. However it should be noted that in some cases respondents may claim to have walked at a level of frequency which is higher or lower than reality. For example a social-desirability bias may lead some respondents to claim higher levels of walking participation than reality or an effect called telescoping may lead to respondents recalling walking during the last month when the walk actually took place longer ago.
- The wording of the questionnaire means that the majority of survey results focus on walking. However many of the findings also have wider implications for those people who use a wheelchair or mobility scooter – for example opinions on the accessibility of local areas.
- In some places in the report the results have been analysed by geography, splitting Scotland into 3 areas as follows:
  - Northern Scotland (Grampian, Highland, Perth/Tayside, Western Isles, Orkney, Shetland)
  - Central Scotland (Glasgow, Ayrshire, Lanarkshire, Argyll, Edinburgh & Lothians, Fife, Central)
  - Southern Scotland (Borders/Dumfries & Galloway)



# Executive summary



## Executive summary

### Walking participation

- 55% of Scottish adults walk every day and 26% walk several times a week.
- The largest proportions walk most frequently for leisure or exercise (59% daily or several times a week), to get to local shops (47% daily or several times a week) or to reach a public transport link (32% daily or several times a week).
- During the previous month the vast majority walked in urban places (87%), in particular roadside pavements (71%) while just over half had walked in more rural places (55%).
- Levels of participation were lower amongst those aged 55 and over, people who were not working, and people with no children. Levels were also slightly lower amongst residents of rural areas and residents of the 10% most deprived areas.

### Attitudes to walking

- The majority of Scottish adults either 'strongly agree' or 'tend to agree' that they like to walk because of its benefits to their health, because it helps them to relax or because it is good for the environment (78%, 72% and 62% respectively).

### Increasing participation

- Just over 2 in 5 Scottish adults (42%) think that they walk more often now than 5 years ago. A smaller proportion (24%) walk less often while the remaining third walk the same amount.
- Comparing the net change across different population groups suggests that frequency of walking increased most amongst younger age groups (aged 16-24 and 25-34), people with children and people who are working.

- 40% of those who were walking more often said this was due to a change in personal circumstances, while 37% were walking more to gain health benefits. Other motivations related to socialising (12%), saving money (3%) and protecting the environment (2%).
- Nearly half of those who walked less than 5 years ago said this was due to reasons related to health or old age (45%).
- A number of factors could encourage further increases in walking, especially amongst women. Having someone to walk with, feeling safer at night and improved local paths would have most impact.

## Executive summary

### Active travel

- Around two thirds of Scottish adults would be prepared to walk to their local shop or public transport (64% and 63% respectively) but only around half would walk to their nearest urban green space (50%) and fewer would walk to their place of work (44%).
- In the previous month 55% of Scottish adults had walked to a public transport link as part of a longer journey. This proportion was higher amongst those aged 16-24 (74%), those in the ABC1 social class (59%), those who were working (59%), residents of urban area (60%) and Central Scotland (62%).

### Local paths and walking opportunities

- Attitudes to the condition of paths and opportunities to walk locally were extremely varied.
- While 41% of Scots agree that pavements in their local area are in a good condition, almost as many (37%) disagree. Only a quarter feel that the condition of paths in their local area has improved in the last 5 years (25%) and while 35% agree that the number of services in their local area within walking distance had decreased, almost as many (31%) felt that they had increased.
- The majority of Scots (63%) have recently experienced problems that forced them to change their walking route or made them less likely to walk in the same place in future. The most common issues were cars parked on pavements, cyclists on pavements and poor pavement maintenance.

- If they were moving house, having local shops & facilities and a regular bus service within walking distance would be important to the majority of Scottish adults (74% and 64% respectively). In contrast, far fewer stated that convenience of routes to drive to the nearest town centre (33%) or to retail parks (26%) would be important.

### Communicating the benefits

- 43% of Scottish adults had recently seen or heard any advertising or other communications regarding the benefits of walking and cycling.
- Recall was highest amongst the youngest age groups, those with children at home and people living in Central Scotland.
- The largest proportions had seen or heard something regarding the health benefits of walking or cycling (27%) or the environmental benefits (22%).



# Walking participation

How often, why and where Scots walk

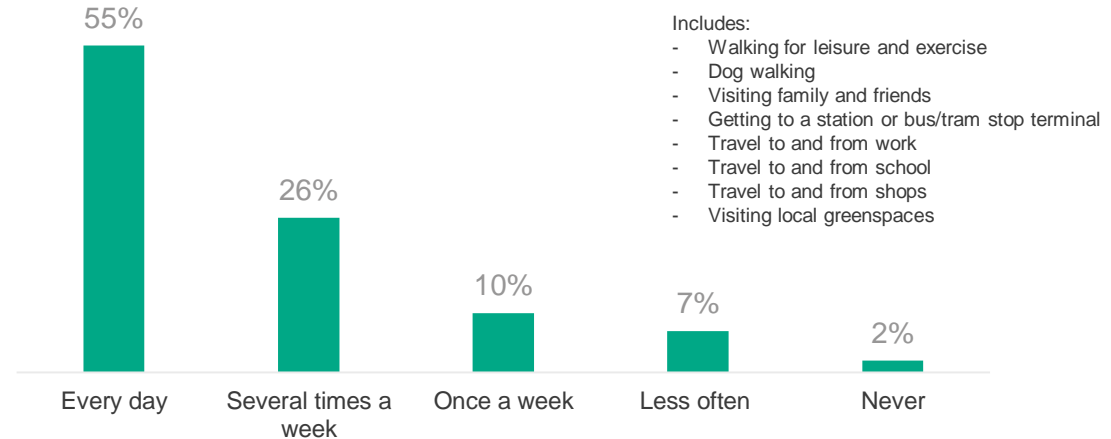


## Most Scottish adults walk on a regular basis, over half on a daily basis

Overall just over half of Scottish adults normally take part in walking every day (55%) while a further 26% walk several times a week.

This total includes walking for any duration, for any purpose and to any type of place.

**FIGURE 1 – General frequency of walking for any reason**



Q001. How frequently, if ever, do you walk for the following purposes?

Q002. How frequently, if ever, do you walk to each of the following places?

NET combing all reasons and types of place (All respondents N=1,001)



## Scots walk regularly for many reasons but leisure and exercise is the most common motivation

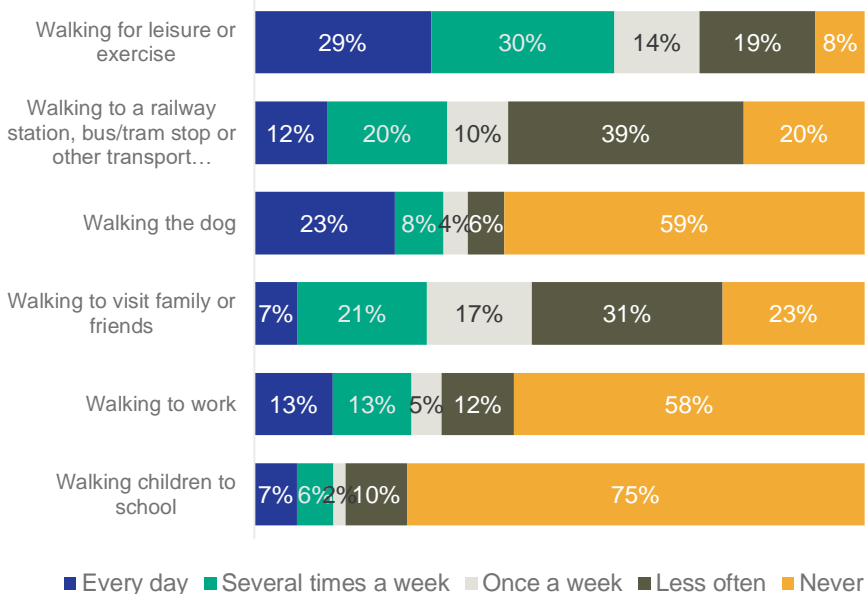
Frequency of walking varied significantly by reason with the highest proportions walking most regularly for leisure or exercise.

Participation for other reasons was more varied between population groups.

39% of those people who work walk there daily or several times a week (26% of the adult population overall).

45% of people with children walk them to school daily or several times a week (13% of the adult population overall).

**FIGURE 2 – Frequency of walking by reason (ranked by % walking at least several times a week)**



39% of working population walked several times a week or more.

45% of those with children walked several times a week or more.

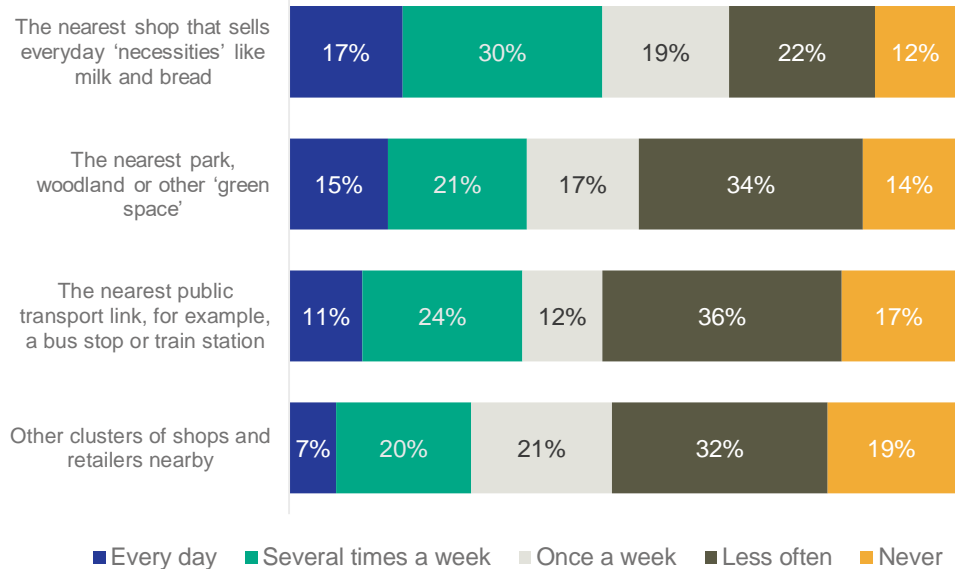
Q001. How frequently, if ever, do you walk for the following purposes? (All respondents N=1,001)

## Local shops are the most common walking 'destination'

Just under half of Scottish adults walk to their local shop to obtain necessities on several occasions per week or every day (47%).

Smaller proportions walked this often to other places including their local parks, public transport links and other shops.

**FIGURE 3 – Frequency of walking by destination (ranked by % walking at least several times a week)**



Q002. How frequently, if ever, do you walk to each of the following places? (All respondents N=1,001)



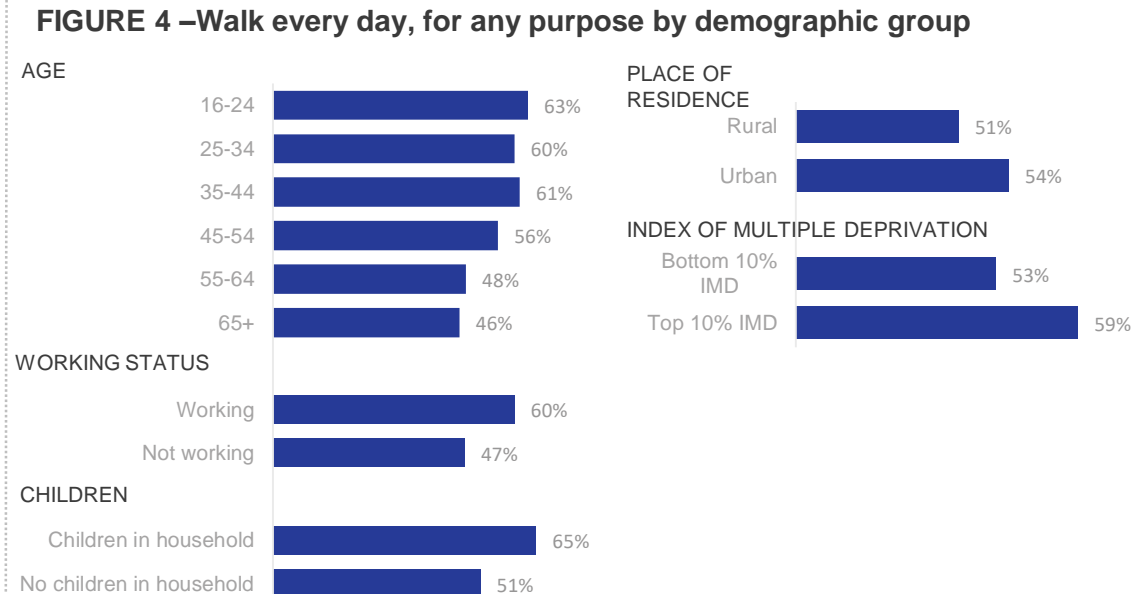


## Frequency of walking varies by a number of demographics but most significantly by age

While 55% of Scottish adults normally take part in walking every day, this proportion varies significantly across different demographic groups.

Most notably, levels of participation in walking at this most frequent level were somewhat lower for those aged 55 or over, people who were not working and people with no children in their household.

Also people living in rural areas and in the 10% most deprived areas were slightly less likely to walk every day.



Q001. How frequently, if ever, do you walk for the following purposes? - NET result for all purposes (All respondents N=1,001)



## Reasons for walking also vary significantly by demographic

Reflecting general levels walking for different purposes and to different types of place, when respondents were asked about walking undertaken in the last month, the largest proportions had walked to get to local shops or services or taken walks for leisure or exercise.

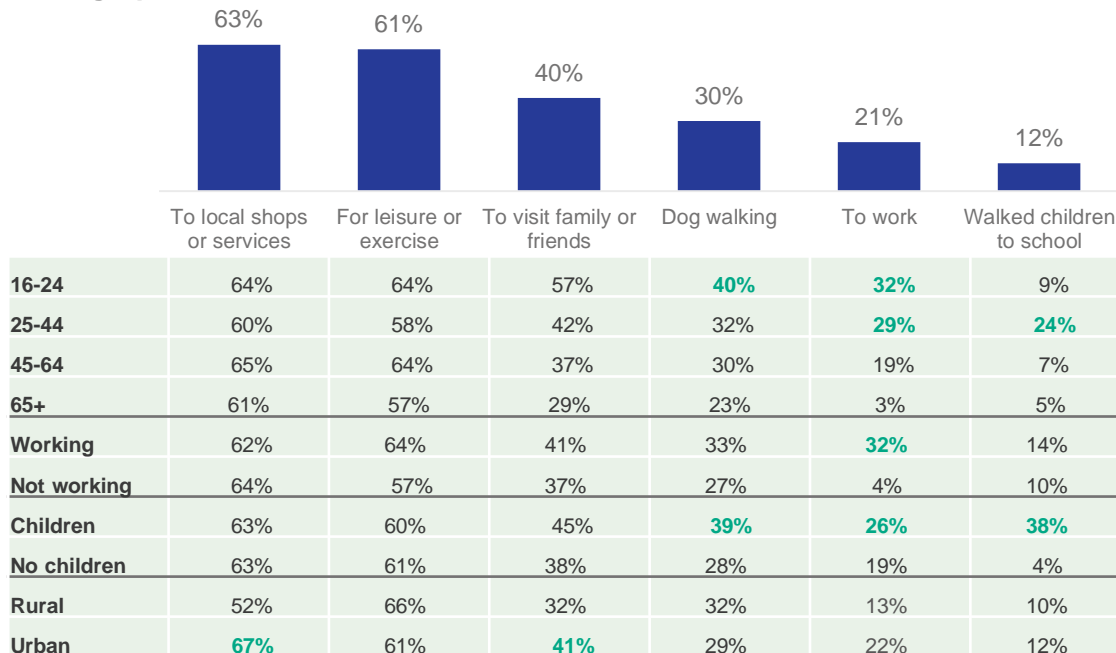
However, as shown in Figure 5 levels of participation in walking for different reasons varied by demographic (significant differences highlighted in green).

Differences included a higher share of younger people dog walking or walking to work and higher levels of walking to local shops and to visit friends and family amongst residents of urban areas.

Overall 95% of Scottish adults had walked for one or more of the purposes asked about during the previous month, 65% for leisure or exercise purposes.

By comparison the Scottish Household Survey recorded that during 2018 some 68% of adults had walked for at least 30 minutes for recreation purposes.

**FIGURE 5 – Walking in the last month amongst all adults and by key demographics**



Q009? Which of the following, if any, have you done in the last month, where walking was the main part of the journey? (Respondents who ever walk N=970)

## Most walking takes place in urban places such as roadside pavements and parks

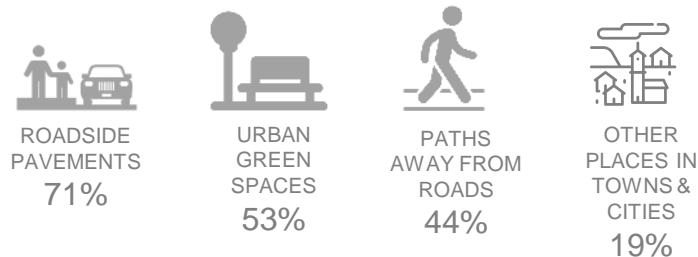
Overall 87% of respondents had walked in one or more places within towns and cities during the previous month with the largest proportions walking on roadside pavements and in urban greenspaces such as parks or woodland.

A much smaller proportion (55%) had walked in any rural locations with the highest proportions walking in woodland and forests or beaches and the coastline.

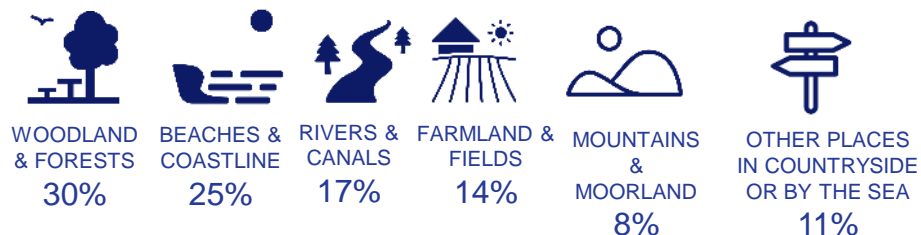
Variations in the types of place walked in by demographic groups included a higher proportion of people aged 16-24 using urban green spaces and paths away from roads while people with children were more likely to visit rural woodland and forests.

**FIGURE 6 – Places walked to in the last month**

PLACES IN TOWNS AND CITIES – **87%** OVERALL INCLUDING:



PLACES IN COUNTRYSIDE AND COAST – **55%** OVERALL INCLUDING:



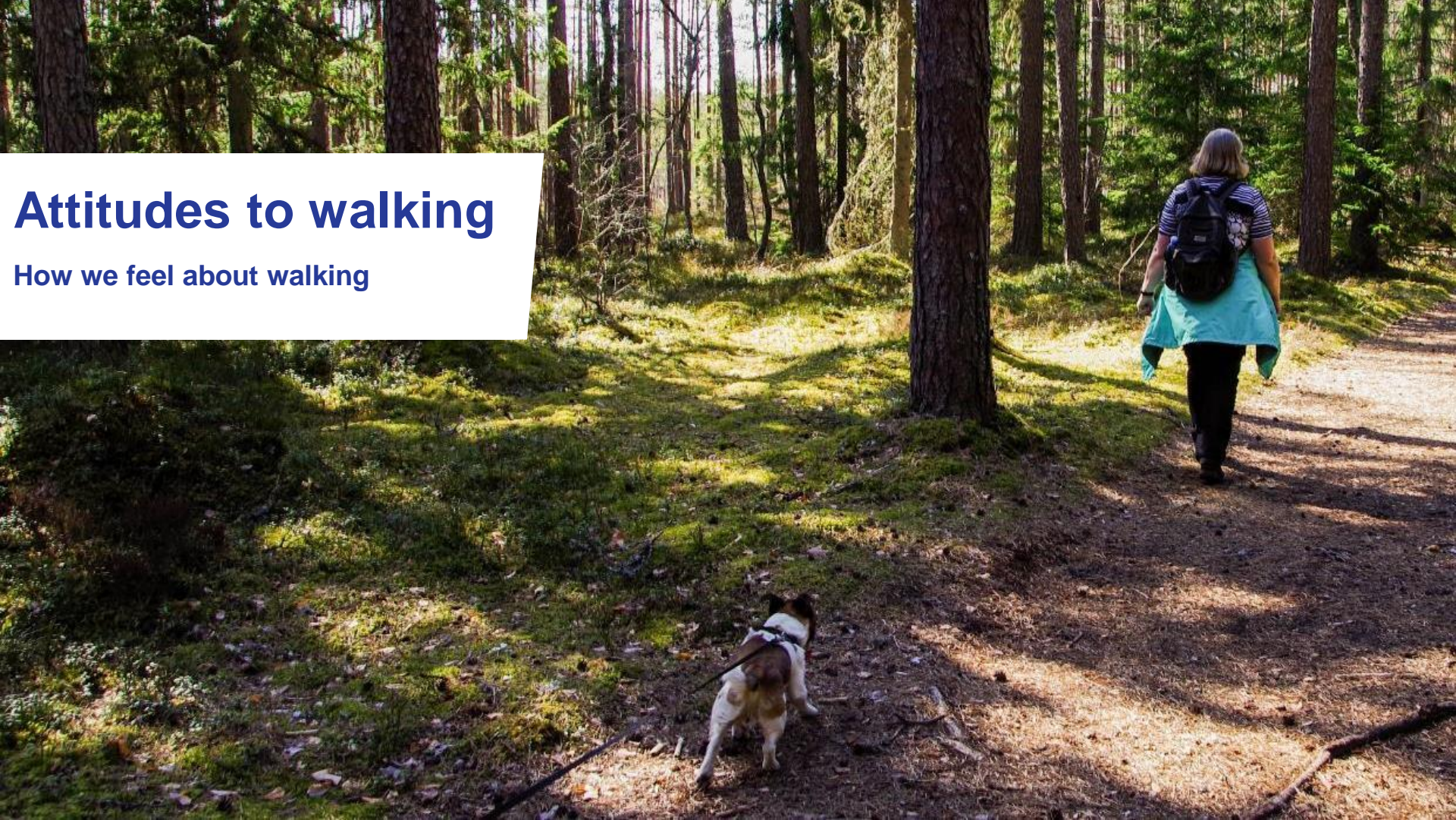
Q009? In which, if any, of the following places have you walked during the past month? (All respondents N=1,001)





# Attitudes to walking

How we feel about walking



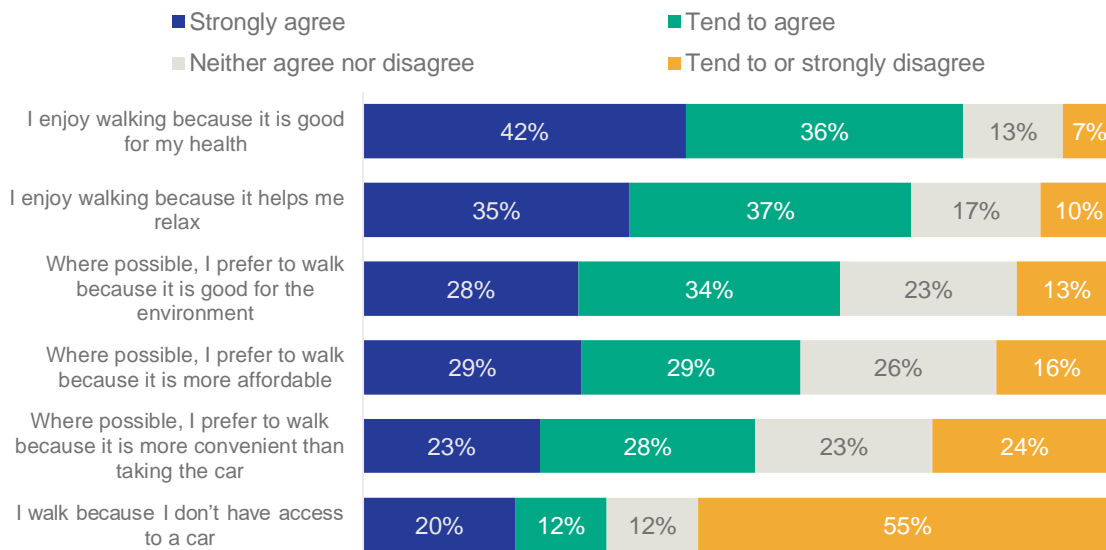


## Most Scottish adults enjoy walking because of the health and wellbeing benefits

Respondents were shown a series of statements and asked to what extent they agreed or disagreed with each.

Levels of agreement were strongest for the statements related to the health and wellbeing benefits of walking, closely followed by the environmental benefits and saving money by walking.

**FIGURE 7 – Attitudes to walking**



Q012. To what extent do you agree or disagree with each of the following statements about walking? (All respondents N=1,001)



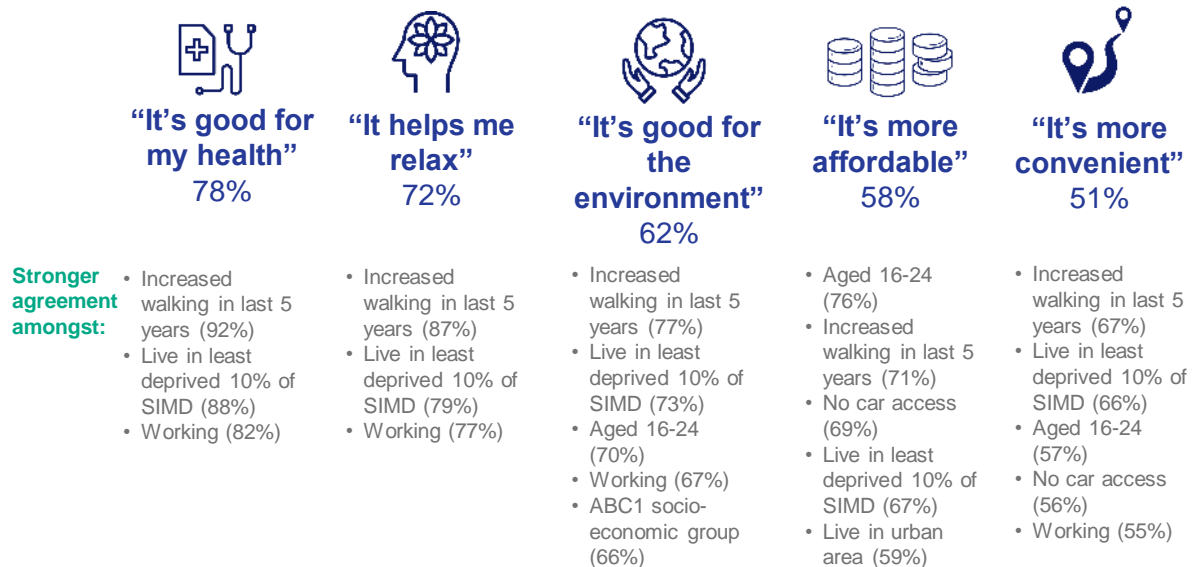
## Recognising the benefits of walking and increasing participation are closely related

Attitudes to walking varied across the population with higher levels of agreement with the statements amongst certain population groups.

Notably, people who walked more frequently than 5 years ago were much more likely to agree with all of the statements, suggesting that these positive attitudes may have motivated increased participation. People living in the least deprived areas and people who were working were also more likely to agree with all of the statements.

Comparing levels of agreement by age, it is notable that younger people (16-24) were more likely to agree with the benefits of walking in terms of the environment, affordability and convenience.

**FIGURE 8 – Attitudes to walking – strongly agree or tend to agree**



Q012. To what extent do you agree or disagree with each of the following statements about walking? (All respondents N=1,001)



# Increasing participation

Emerging trends and opportunity for growth



## Over two fifths of Scottish adults walk more frequently than 5 years ago

Just over 2 in 5 Scottish adults (42%) think that they walk more often now than they did 5 years ago.

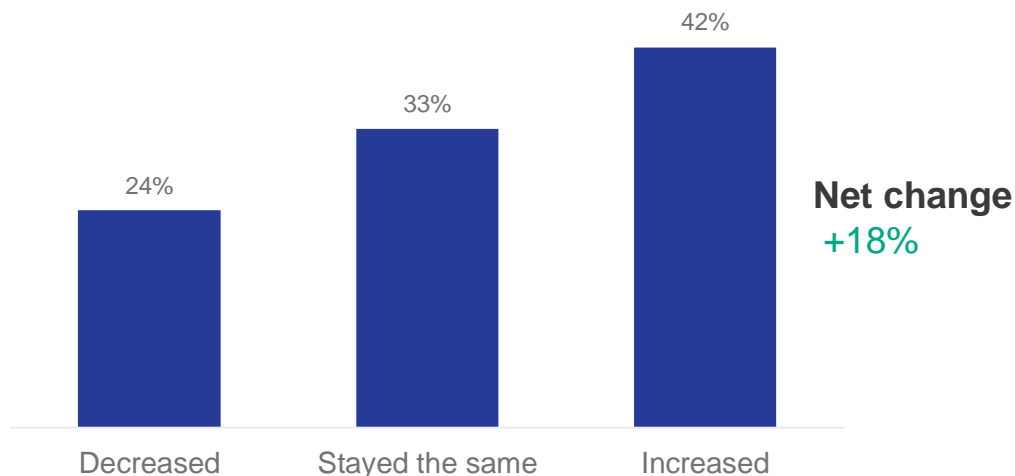
A smaller proportion (24%) think that they walk less often while the remaining third walk the same amount.

A net change can be calculated by subtracting the percentage who have decreased walking from the percentage who have increased.

The resulting net change of +18 suggests that overall the Scottish population is walking more often than 5 years ago.

Increased levels of participation in walking have also been recorded in the annual Scottish Household Survey (SHS) in recent years. SHS recorded that in 2018 68% of Scottish adults walked for at least 30 minutes for recreation purposes, an increase from 59% in 2012.

**FIGURE 9 – Change in participation in walking in last 5 years**



*Q003. Compared to 5 years ago, has the frequency that you walk increased, decrease or stayed the same? (All respondents N=1,001)*



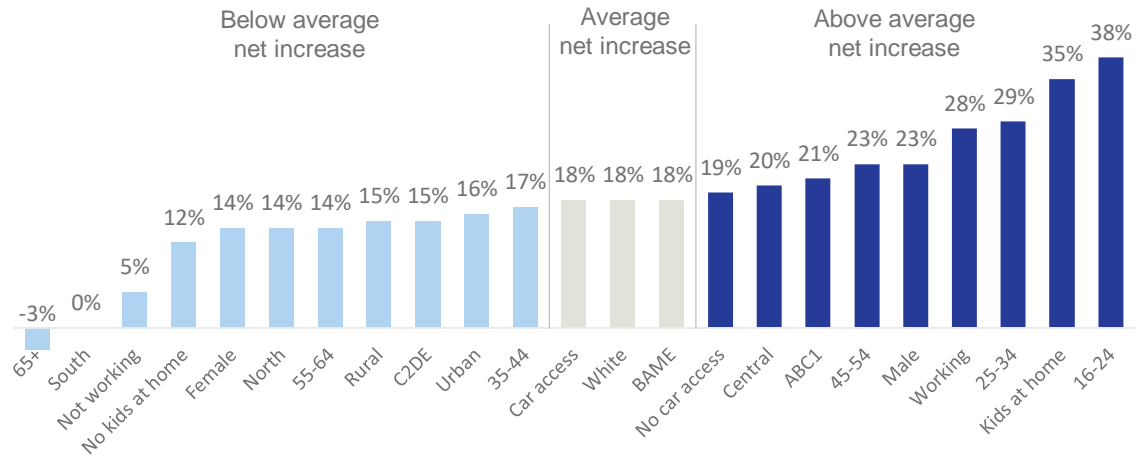


## Younger age groups and people with children were most likely to report increasing their participation levels

Comparing the net change across different population groups suggests that frequency of walking increased most amongst younger age groups (aged 16-24 and 25-34), people with children at home and those who were working.

In contrast, the 65+ age group reported a net decrease in walking frequency over the last 5 years.

**FIGURE 10 – Net change in participation in walking in last 5 years by demographic**



Q003. Compared to 5 years ago, has the frequency that you walk increased, decrease or stayed the same? (All respondents N=1,001)



## A change in personal circumstance or desire to get healthier was the most common reason for walking more often

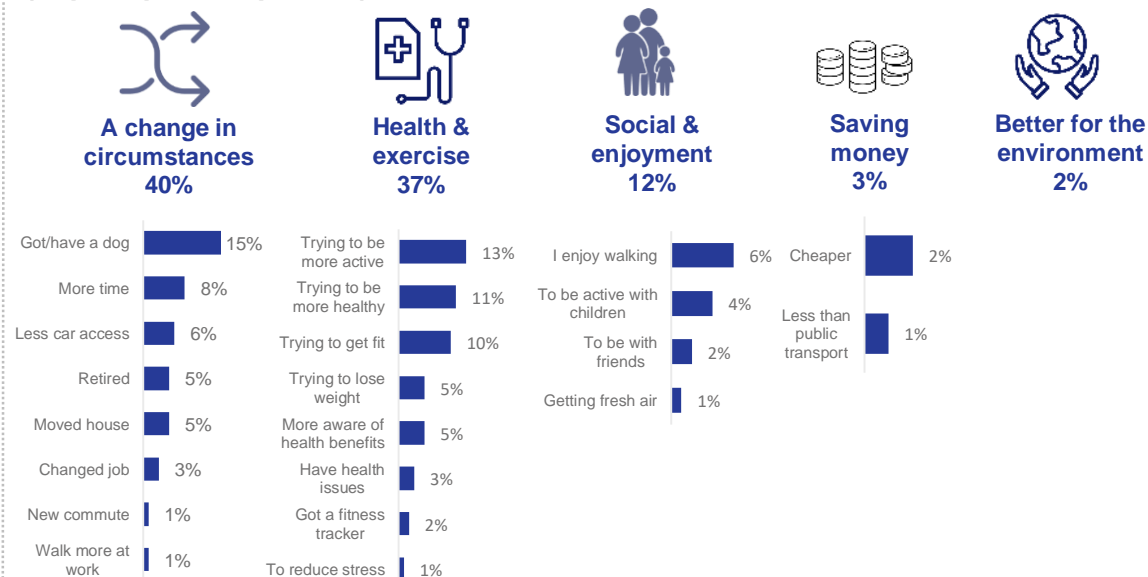
Those respondents who stated that they walked more often than 5 years ago were asked to say why this was the case.

Overall 40% indicated that their increased frequency of walking was related to a change of personal circumstances with the most frequently provided responses relating to getting a dog, having more time or reduced access to a car.

37% stated that they were walking more often due to a reason related to health and exercise with responses ranging from those who were trying to be more active and healthy to those who were seeking to reduce stress.

Other motivations were mentioned less often but included spending time with family and friends and enjoyment. A very small proportion referenced environmental concerns as a factor in their increased walking levels (2%).

**FIGURE 11 – Reasons for walking more often than 5 years ago (unprompted responses)**



*\*Q004. You stated that the amount you walk has changed in the last 5 years - Why do you think this is? (Respondent taking more visits N=374)*

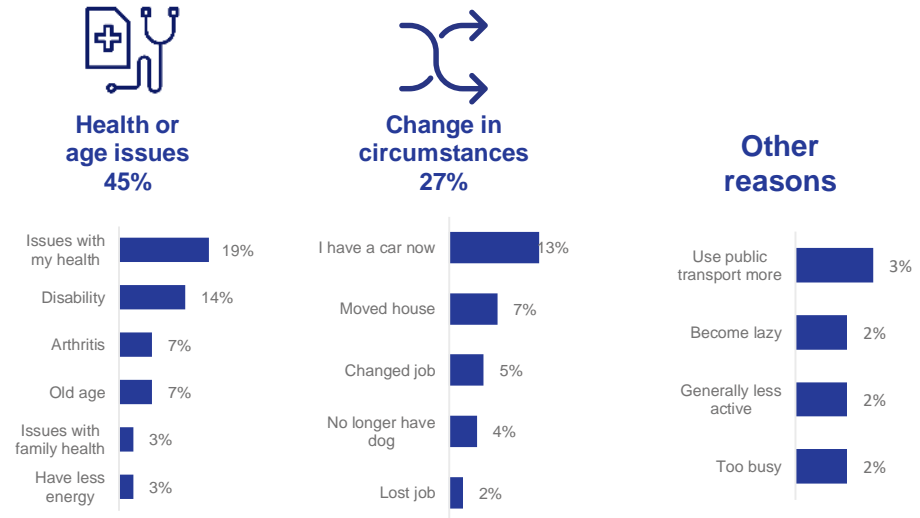
## Almost half of those decreasing walking frequency reported health related issues

Respondents who walked less than 5 years ago were also asked to say why this was the case.

Nearly half mentioned reasons related to health or old age (45%) including personal health issues and those of a family member.

Around a quarter (27%) of those walking less often stated that this was due to a change in personal circumstances such as getting a car, moving house or changing job.

**FIGURE 12 – Reasons for walking less often than 5 years ago (unprompted responses)**



*\*Q004. You stated that the amount you walk has changed in the last 5 years - Why do you think this is? (Respondent taking fewer visits N=222)*



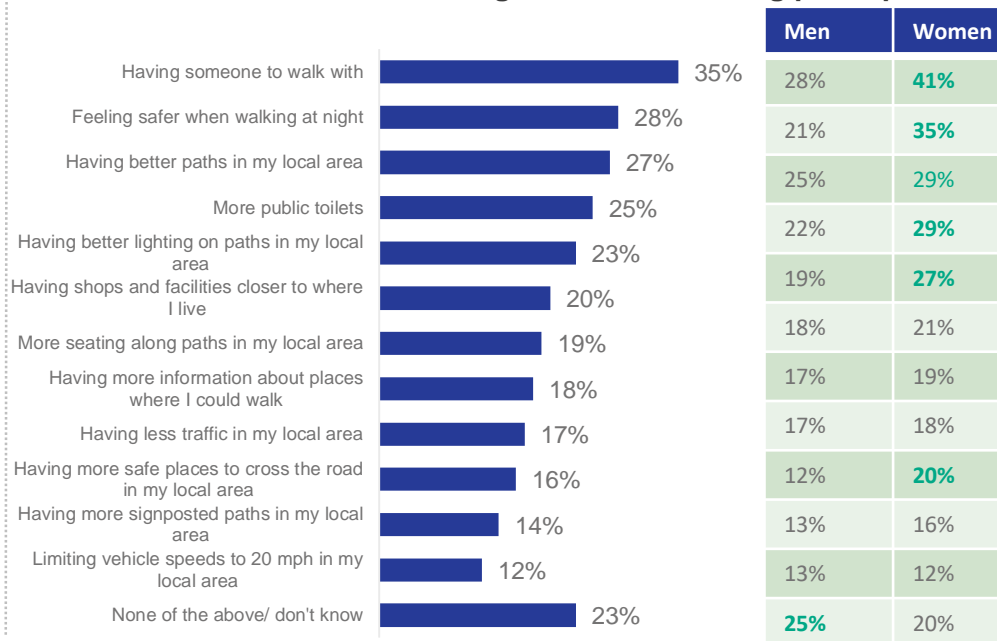
## A range of factors would encourage increased participation especially amongst women

Looking to the future, respondents were shown a list of options and asked which, if any, would encourage them to walk more often.

Overall 77% selected one or more of the options provided, with women and people aged 16 to 34 the most likely to do so.

The most frequently selected answers were having someone else to walk with and feeling safer when walking at night. Both of these responses were selected by a significantly higher proportion of women than men.

**FIGURE 13 – What would encourage increased walking participation**



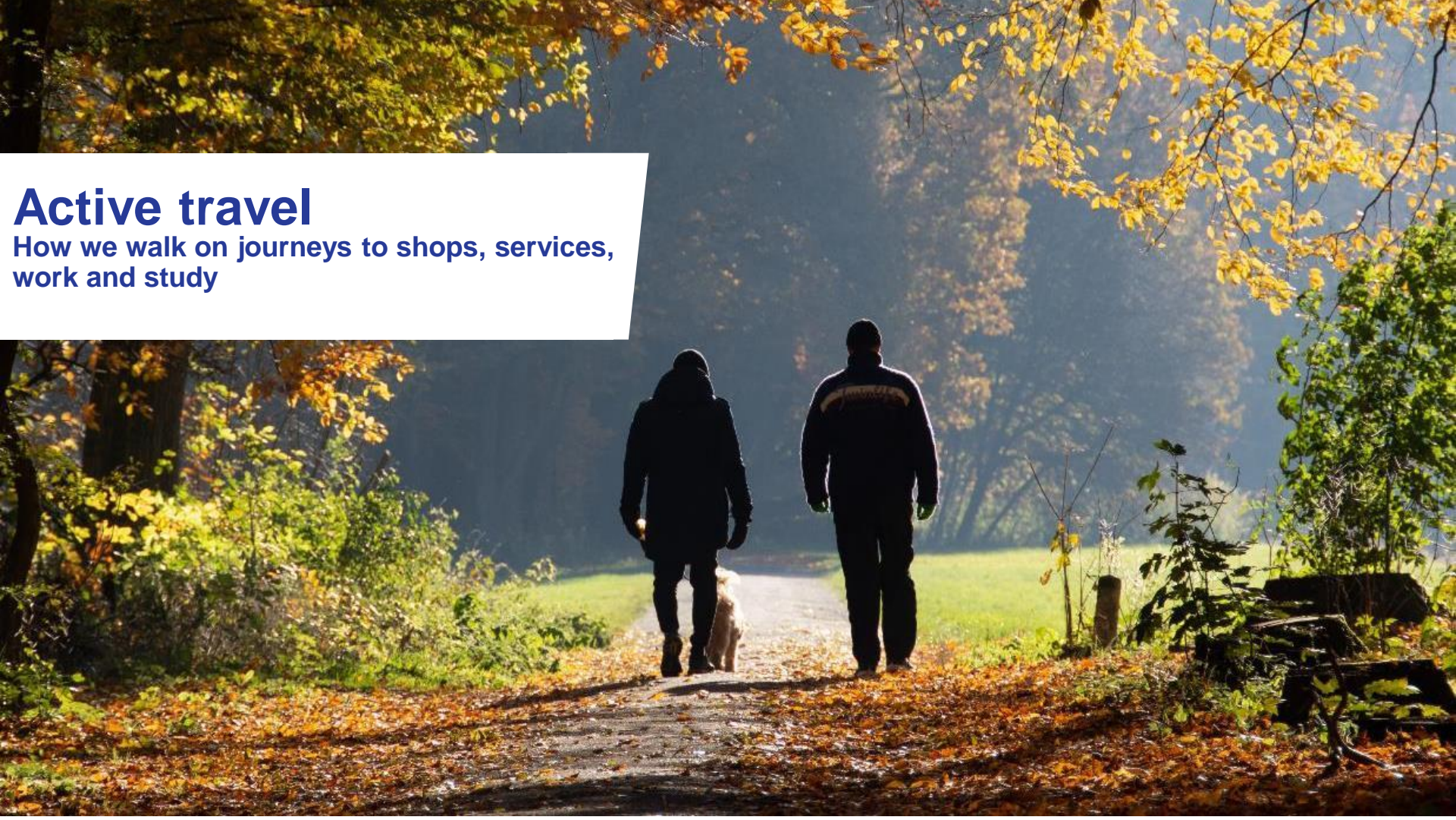
Q013. Which of the following, if any, would encourage you to walk more often? (All respondents N=1,001)





# Active travel

How we walk on journeys to shops, services, work and study



## Most Scots would not walk for more than 20 minutes to reach shops, schools and other local services

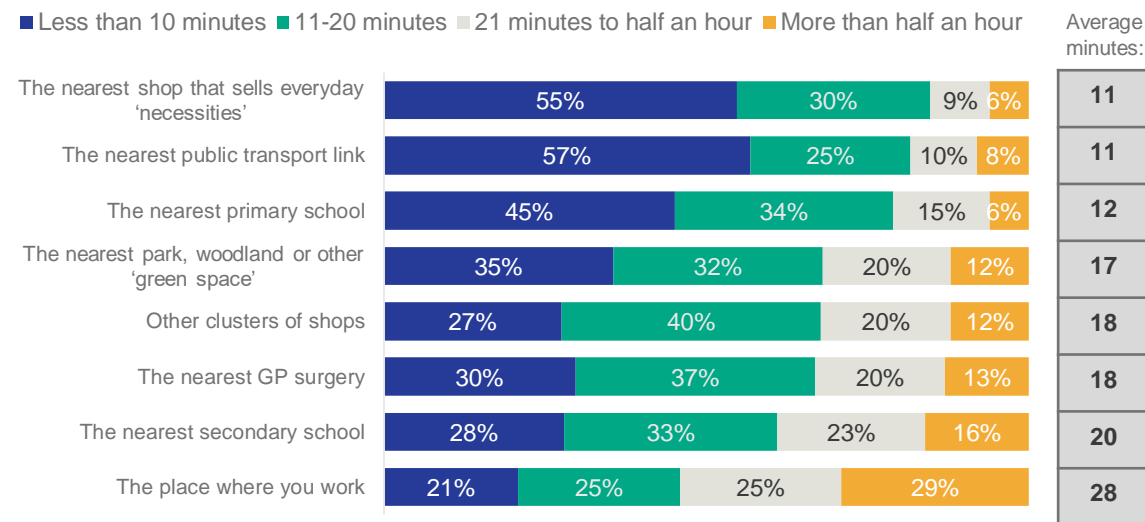
Respondents were asked how long they would be prepared to walk for to reach a number of different types of place.

Figure 14 illustrates the responses provided, excluding those respondents who provided an answer of 'don't know' or 'not applicable' (for example if they did not have a workplace or child at school). The chart also includes an average duration based on the mid points of each of the answer options provided.

With the exception of workplaces, the majority of Scots would not be prepared to walk for more than 20 minutes to reach any of the places asked about.

The shortest durations would be walked to reach shops that sell necessities and public transport links.

**FIGURE 14 – Durations would be prepared to walk**



Q010. Personally, how long would you be prepared to walk for to get to each of the following places? (All respondents excluding Don't Know/Not applicable responses)

## On average the time to walk to local services is longer than the time people are prepared to walk for

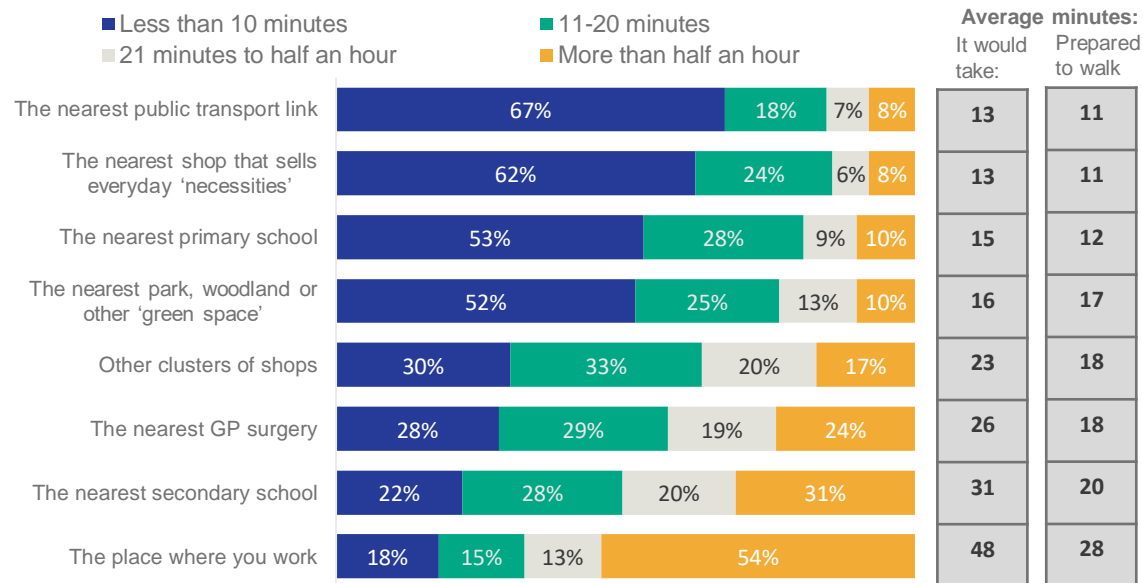
Respondents were asked how long it would actually take for them to walk to the same places in their local area.

Figure 15 illustrates the responses provided, excluding respondents who provided a response of 'don't know' or 'not applicable'. The chart also shows the average number of minutes it would take to walk and, for comparison, the average number of minutes they would be prepared to walk for (see Figure 14).

The largest gap between the time people would be prepared to walk and the time it would take was recorded for secondary schools and workplaces.

The Scottish Household Survey also asked respondents to indicate how long it would take to walk to their nearest greenspace. In the SHS in 2018 65% of adults reported living within a 5 minute walk while a further 21% lived within 6 to 10 minutes. These figures are somewhat higher than recorded in this study, potentially due to the longer list of types of place used in the definition of greenspace offered to respondents (parks, play areas, canal paths, riversides and beaches).

**FIGURE 15 – Duration it would actually take to walk**



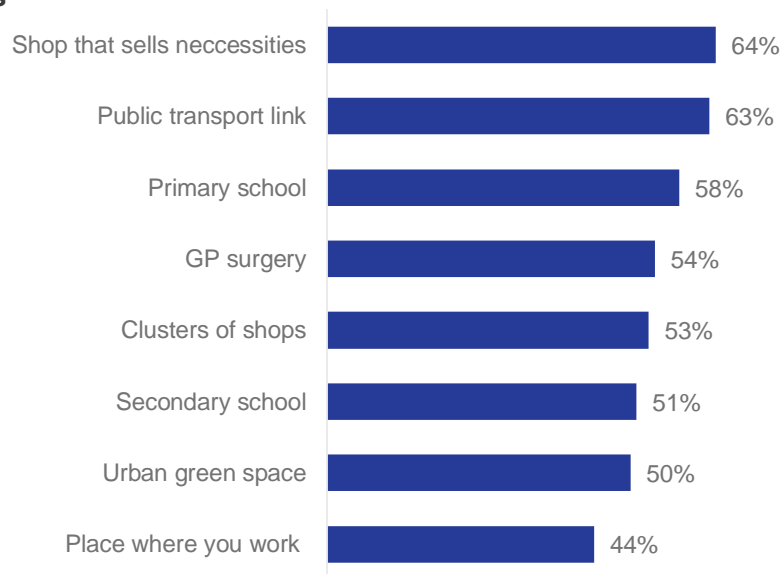
Q011. Roughly how long would it actually take you to walk from home to each of the following places? (All respondents excluding Don't Know/Not applicable responses)

## Shops and public transport links are the places most likely to be within reach of walking

Figure 16 illustrates the proportion of the population who indicated that they would be prepared to walk the duration required to reach each of the services asked about.

While almost two thirds would be prepared to walk to their local shops that sell necessities or to public transport links (64% and 63%), only half would be prepared to walk for the time required to get to their nearest green space while significantly fewer would be prepared to walk to work.

**FIGURE 16 – Proportion of population prepared to walk to reach their local services**



Q010. Personally, how long would you be prepared to walk for to get to each of the following places? (All respondents excluding Don't Know/Not applicable responses)

Q011. Roughly how long would it actually take you to walk from home to each of the following places? (All respondents excluding Don't Know/Not applicable responses)





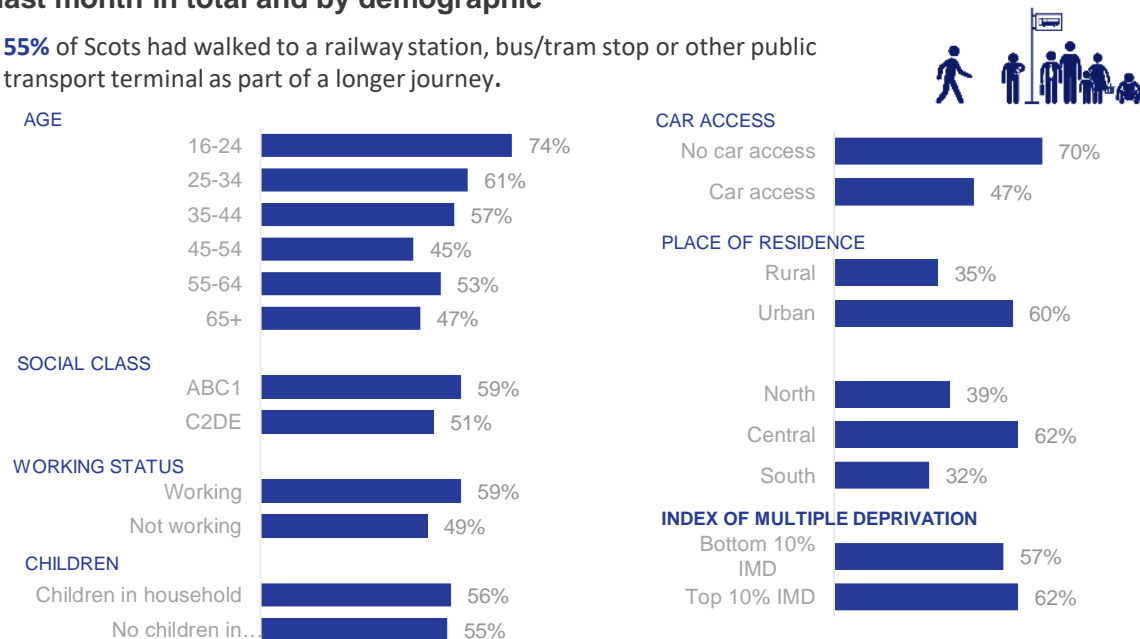
## Just over half of Scottish adults walk to public transport links

Just over half of Scottish adults had walked to a railway station, bus stop or other public transport terminal in the month prior to the survey.

However, as illustrated below, this proportion was higher amongst younger people, those in the ABC1 social class, those who were working and residents of urban areas, particularly in Central Scotland.

**FIGURE 17 – Proportion of population who walked to a public transport link in last month in total and by demographic**

**55%** of Scots had walked to a railway station, bus/tram stop or other public transport terminal as part of a longer journey.



Q006. And during the last month, have you walked to a railway station, bus/tram stop or other transport terminal as part of a longer journey? (All respondents N=1,001)

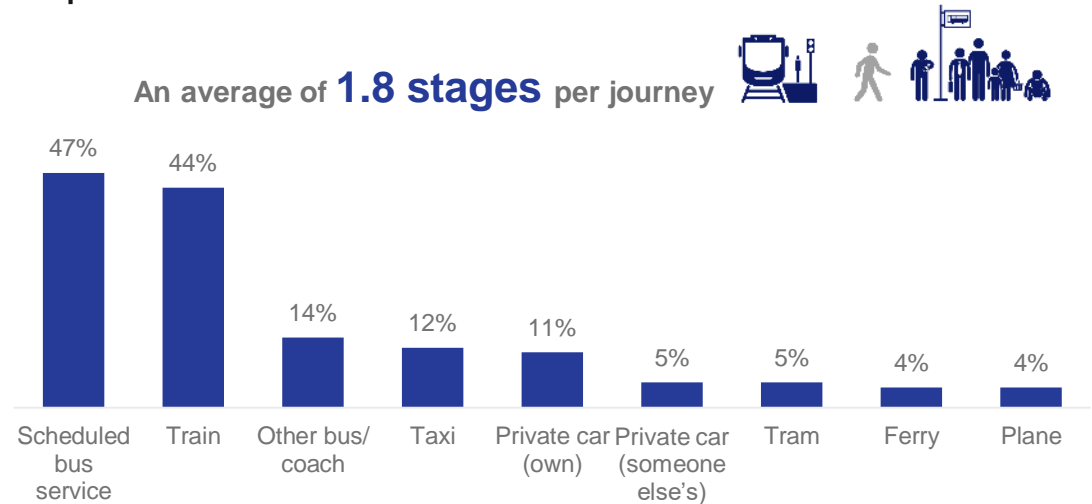
## Mixed mode journeys

Figure 18 illustrates the transport modes used by those Scots who had walked to a public transport link (based on most recent journey).

The highest proportions had travelled on a scheduled bus service or by train on their most recent journey.

On average journeys involved 1.8 stages (e.g. different modes or bus routes requiring changes).

**FIGURE 18 – Modes used on last journey which involved walking to a public transport link**



Q007. Thinking of the last occasion you did this, which of the following modes of transport did you use on this journey? (Respondents who walked to public transport)

Q008. How many stages did this journey include in total? (N=552)





## Local paths and access

Experiences and expectations for walking in local areas

## Scots have a wide range of opinions on their local paths and opportunities to walk to local services

Respondents were presented with a series of attitude statements and asked to rate to what extent they agreed or disagreed with each.

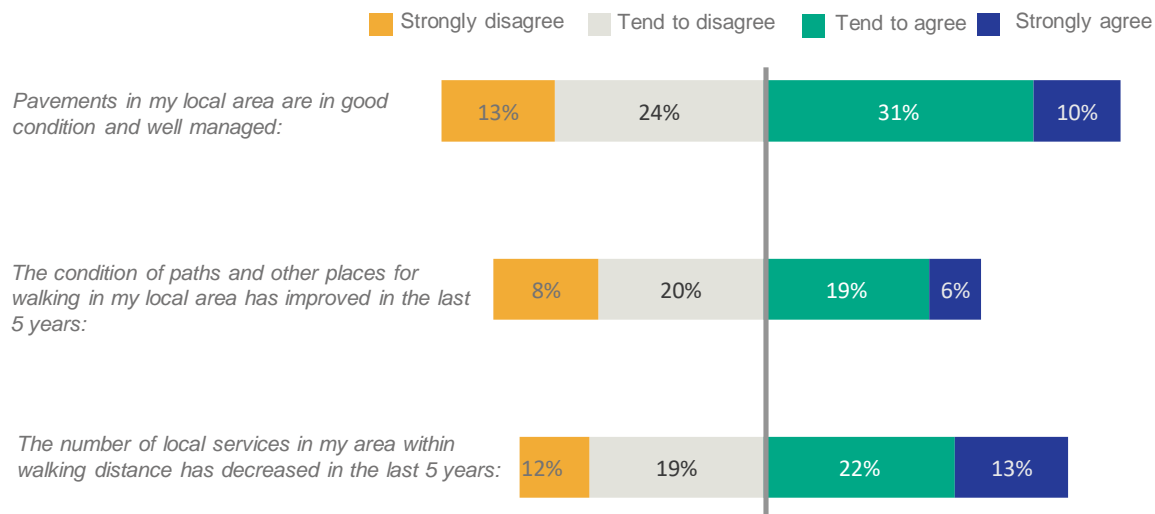
As shown in Figure 19, each of the statements received a wide range of responses.

While 41% agreed that pavements in their local area were in a good condition, almost as many (37%) disagreed.

Only a quarter felt that the condition of paths in their local area had improved in the last 5 years (25%) slightly less than the proportion who disagreed with this statement (28%).

Similarly, while 35% agreed that the number of services in their local area within walking distance had decreased, almost as many (31%) disagreed with this statement.

**FIGURE 19 – Levels of agreement with attitude statement relating to walking in local area**



Note: proportions neither agreeing or disagreeing not shown.

Q016. The next few questions are related to your local area, by this we mean the town or village you live in, your city neighbourhood, etc. To what extent do you agree or disagree with each of the following statements about walking in your local area? (All respondents N=1,001)





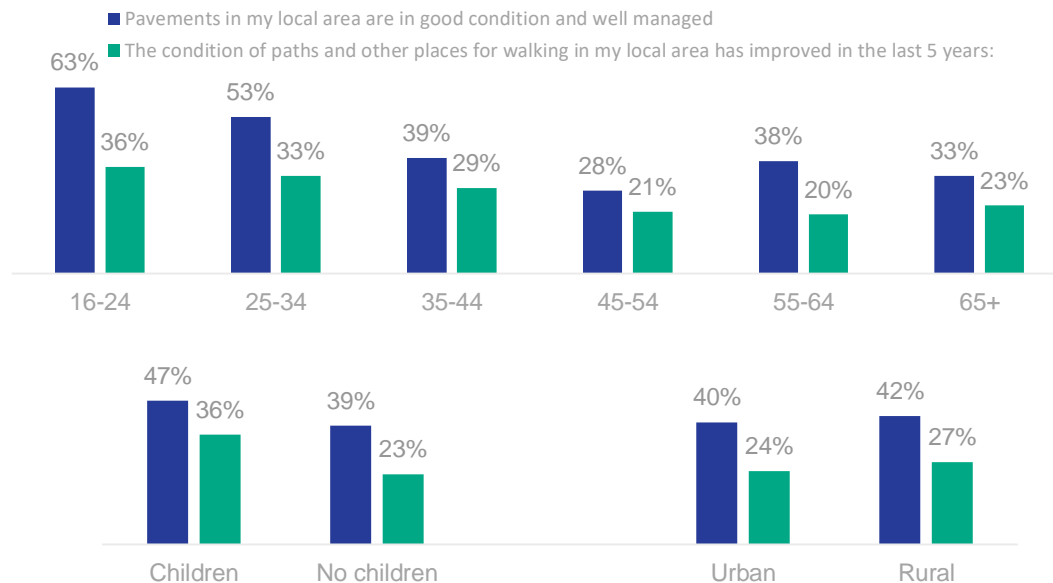
## Concerns over the condition of paths and pavements increase with age

Levels of agreement with the statements varied across different population groups.

As illustrated in Figure 20, attitudes toward the condition of local paths and pavements and the extent to which these had improved tended to be highest amongst younger age groups but declined with age.

Potentially related to these age variations, people with children living at home were also more likely to have positive attitudes. However there were no significant differences in the responses from people living in urban and rural locations.

**FIGURE 20 – Agreement with statements ('strong' or 'tend to') by age, children at home and place of residence**



Q016. The next few questions are related to your local area, by this we mean the town or village you live in, your city neighbourhood, etc. To what extent do you agree or disagree with each of the following statements about walking in your local area? (All respondents N=1,001)



## Cars parked on pavements are the most common issue encountered by people when walking

Respondents were shown a list of potential issues and asked if they encountered any of these recently while walking locally and whether these issues had caused them to change their route or not walk in this place again.

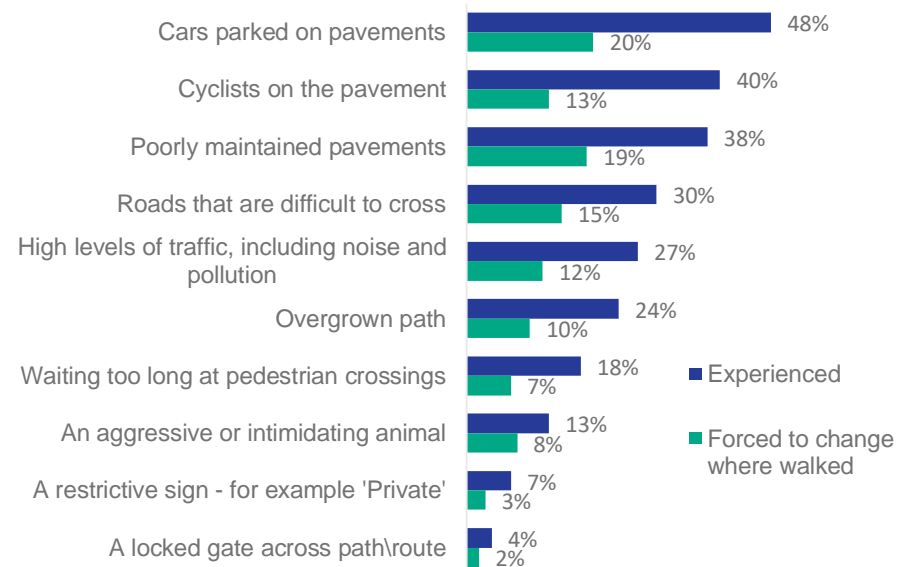
The majority (85%) reported experiencing one or more of the issues and almost two thirds (63%) had been forced to change where they walked.

Possibly reflecting the high frequency of walking in urban areas, the most common issues related to experiences on roadside pavements including cars parked on pavements, cyclists on pavements and poor pavement maintenance.

A similar question regarding difficulties encountered on visits is included in the 2017-18 Scotland's People and Nature Survey (SPANS) undertaken by SNH. This survey relates to outdoor recreation visits taken in green spaces such as parks, countryside or coast.

SPANS found that on these types of visit less than a third of visitors experienced any difficulties (31%) with very small proportions facing issues such as annoying dogs (3%), unwelcoming signs (2%) or man made obstructions (2%).

**FIGURE 21 – Issues encountered when walking in local area**



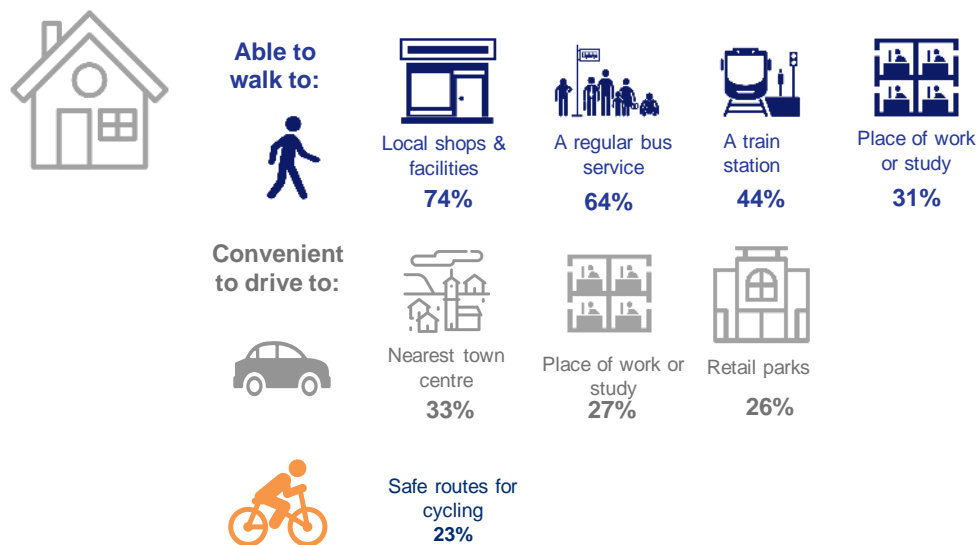
Q017. While walking in your local area recently which, if any, of the following have you experienced?  
 Q018. And which of these, if any, caused you to change where you walked (e.g. take a different route) or make you less likely to walk in this place again?  
 (All respondents N=1,001)

## Imagine you were moving house...

In the scenario where they were moving house to a different area, local shops & facilities and a regular bus service within walking distance would be important to the majority of Scottish adults (74% and 64% respectively). 44% stated that a train station within walking distance would also be important while a smaller proportion (31%) would want to be within walking distance of their place of work or study.

In contrast, smaller proportions indicated that convenience of routes to drive to the nearest town centre or drive to retail parks would be an important factor in their choice of place to live.

**FIGURE 22 – Factors which would be important when choosing where to live**



Q019. Finally, imagine you were moving house to a different area. In this imaginary situation how important would each of the following be in your choice of where to live?. (All respondents N=1,001)



A close-up, low-angle shot of a person's legs and feet as they run on a paved path. The person is wearing bright pink and white athletic sneakers with white socks. The background is a blurred park setting with green foliage and a bright, sunny sky, suggesting a healthy and active lifestyle.

# Communicating the benefits

How to optimise marketing efforts



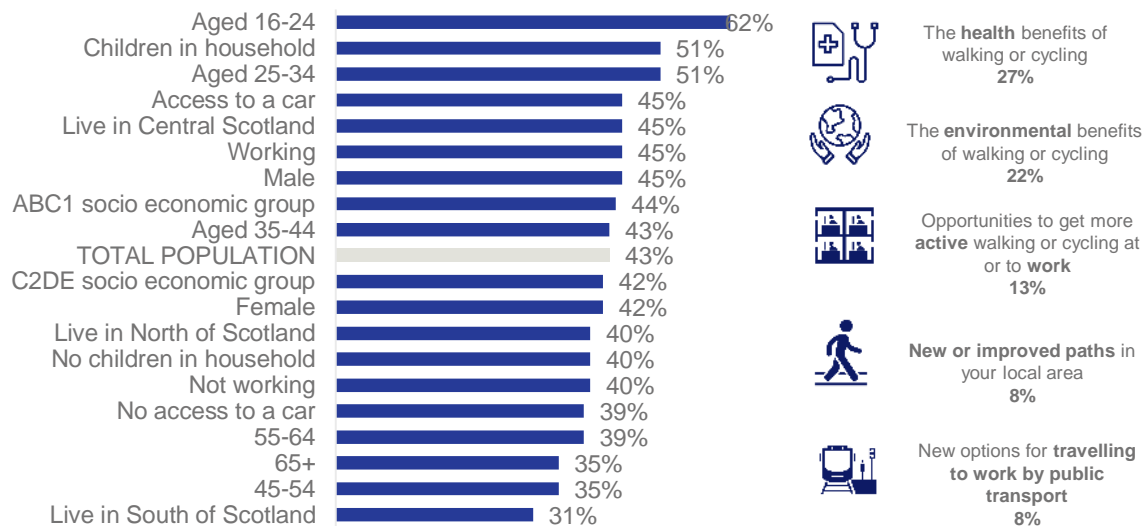
## Communications promoting the benefits of walking reached around two fifths of Scottish adults

Overall 43% of Scottish adults stated that they had seen or heard any advertising, news, discussion or other commentary regarding the walking and cycling related topics shown in the right.

Highest levels of recall were reported by the youngest age groups, those with children at home and people living in Central Scotland.

The largest proportions had seen or heard something regarding the health benefits of walking or cycling (27%) or the environmental benefits (22%).

**FIGURE 23 – Recall of advertising, news or other communications regarding walking or cycling or paths and routes by demographic group**



Q014. In the last few months, have you seen or heard any advertisements, news, discussions or other commentary regarding the following topics?(All respondents N=1,001)

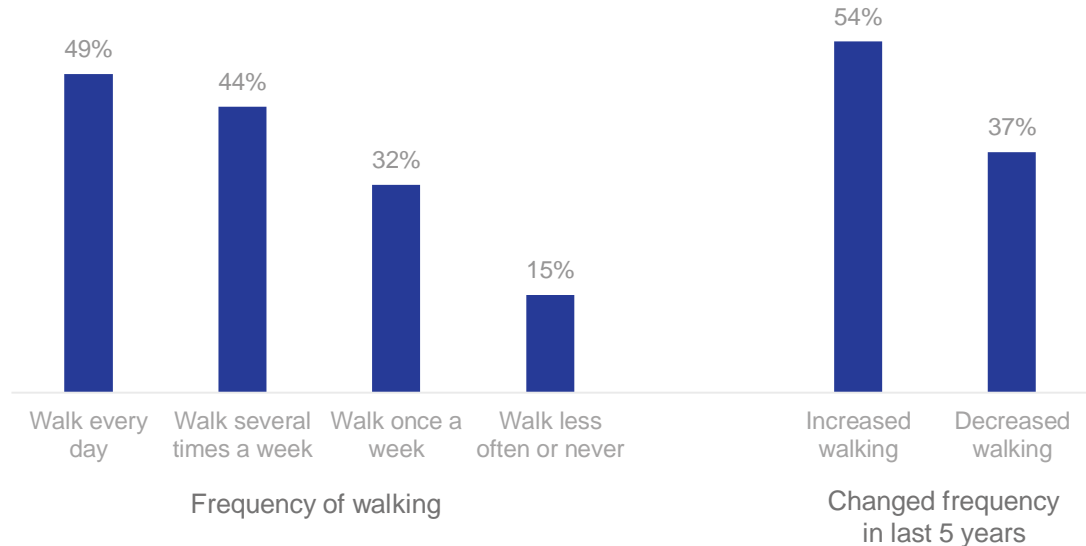


## Frequent walkers were the most likely to have noticed adverts and other communications

While 43% of all Scottish adults had seen or heard any advertising, news, discussion or other commentary regarding walking and cycling, this proportion was significantly higher amongst those who walked most often and amongst those who had increased their walking frequency in the last 5 years.

This correlation could be explained by a number of factors including those demographic groups who walk (or cycle) most often having a greater responsiveness to communications on this topic.

**FIGURE 24 – Recall of advertising, news or other communications regarding walking or cycling or paths and routes by frequency of walking**



Q014. In the last few months, have you seen or heard any advertisements, news, discussions or other commentary regarding the following topics? (All respondents N=1,001)



## A mix of communication channels reaches audiences in every age group

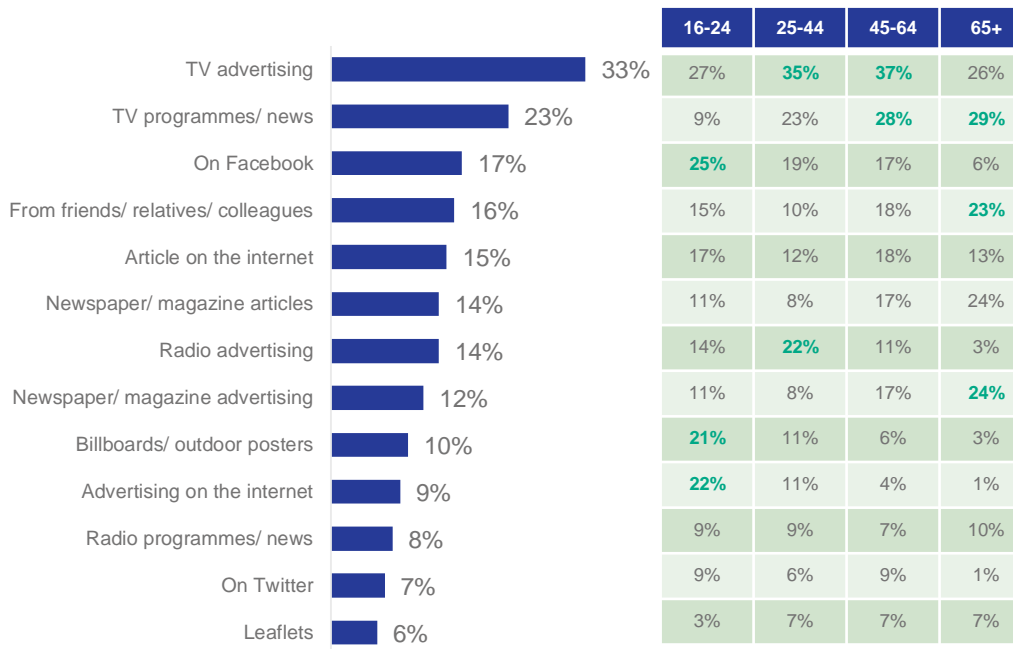
Respondents were asked to specify where they had seen the advertising or other communications regarding walking and cycling.

Overall the most frequently mentioned channels were television adverts and programmes.

However responses varied somewhat by age group:

- **16-24** - more likely to notice communications on Facebook, outdoor advertising or the internet.
- **25-44** – more likely to recall radio advertising.
- **45-64** – the most likely to recall TV advertising
- **65 and over** – the most likely to recall TV programmes, press advertising or to have had a conversation with friends relatives.

**FIGURE 25 – Where saw or heard communications**



'Q015. Where did you see this? (All respondents aware of advertising/communications (N=429))



A photograph of three elderly people walking away from the camera on a paved path in a park. The person on the left is a woman with short reddish hair, wearing a light-colored jacket and dark trousers. The person in the middle is a woman with short white hair, wearing a light-colored jacket, dark trousers, and a black shoulder bag. The person on the right is a man with white hair, wearing a light-colored jacket, dark trousers, and a blue baseball cap. They are all holding hands. The background is a blurred park with trees and fallen leaves on the ground.

# **Segmenting the Scottish population by walking participation and attitudes**

## A segmentation based on walking behaviours and attitudes

### Budding enthusiasts

24% of population



Very regular and enthusiastic, conscious of benefits of walking and increasing participation for these reasons – especially health. Walk in many places including town, countryside and coast.

Would like to be able to walk more and supportive of improvements which make it easier and safer.

Found across a range of demographics but more likely than norm to be under 65, fairly affluent, older families living in urban areas.

### Needs must

15% of population



Walk regularly especially to reach work or study, for shopping and dog walking. Most often on roadside pavements and to public transport. Not particularly positive towards the health, & environmental benefits of walking but most aware of communications.

Would like to be able to more easily walk to the local places they need to reach.

Often younger (GenZ or Millennials), pre family or with young kids, living in urban areas.

### Looking to change

26% of population



Walk fairly routinely, for leisure or shopping but positive attitudes suggest a demand to do more especially for health benefits. A larger than norm share have not changed participation in last 5 years.

Would like to be able to walk to local shops and services. Would like someone to walk with, better signage and to feel safer.

Found across a range of demographics but have the highest level of car ownership of all the segments

### Reluctant rejectors

11% of population



Unlikely to walk regularly, only doing so if they have to. Hold the most negative attitudes to the potential benefits of walking.

Nothing would encourage many in this group to walk more while many would like to see more convenient car access to retail parks. Half decreased walking in last 5 years. Unlikely to have seen communications.

More likely to be found amongst older (55+, baby boomer) age groups and lower socio economic groups and IMD.

### Age and health restricted

23% of population



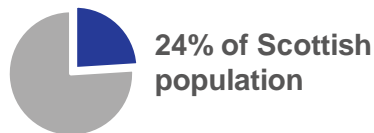
The least likely to walk regularly, often limited by health and age related issues. Attitudes to walking suggest a lack of interest/relevance.

Some might walk to a local shop for necessities but they would prefer to be able to drive in town. Limited use of public transport. The least likely to have changed walking frequency in last 5 years and unlikely to have seen any communications.

Largely older, retired people.



## Budding enthusiasts



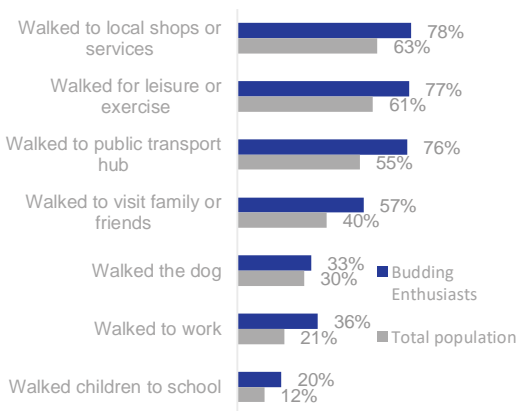
Members of this segment are very regular walkers for a wide range of reasons and enthusiastic participants. They are conscious and motivated by the benefits of walking especially health. They walk in many places including town, countryside and coast.

Whilst they walk regularly members of this group would like to be able to walk more often and they support improvements which would make it easier and safer.

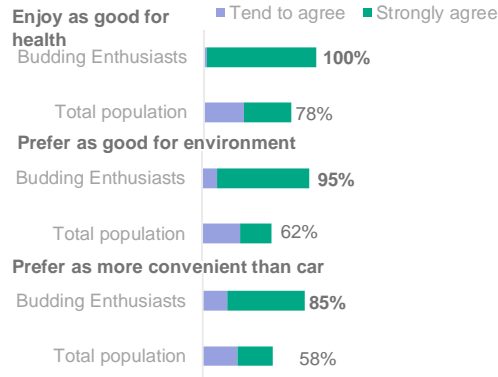
This segment is found across a range of demographics but more likely than norm to be aged under 65, fairly affluent, older families living and living in urban areas.

**Potential opportunities:** Given this group's enthusiasm, their support for walking and its benefits could be used to spread positive word of mouth (traditional and online) to encourage others to walk more. They may also be open to volunteering to support local walking initiatives (e.g. to become Paths for All walk leaders).

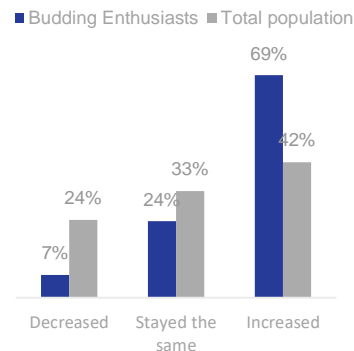
### Participation in walking (last month)



### Attitudes to walking



### Change in walking participation in last 5 years



### Most likely to be found amongst...

- Aged under 65
- Working
- Fairly affluent
- Older families
- Residents of urban areas
- Do not drive a car



## Needs must



**15% of Scottish population**

Members of this segment walk on a regular basis and are more likely than the population average to walk to reach public transport, visit friends or family or get to work. The main place they walk on is roadside pavements.

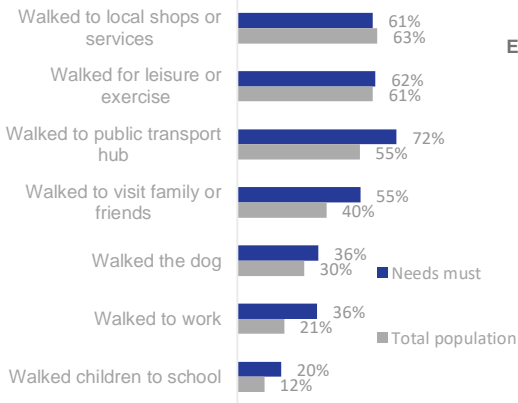
Despite high levels of participation, this group's attitudes to walking are less positive than the population average with relatively small proportions strongly agreeing with the statements regarding the health and environmental benefits of walking.

However during the last 5 years most of this group have increased their walking and many would like it to be easier to be able to walk to local places like shops. They are the most likely to have seen or heard any communications promoting walking.

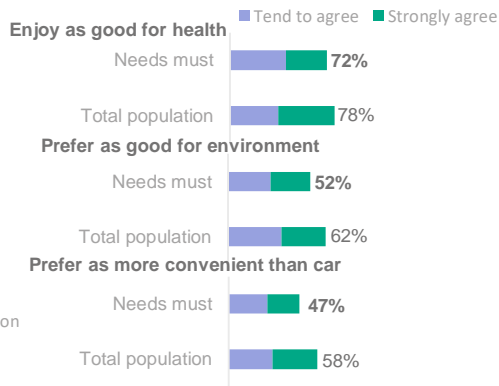
This segment tends to be younger, pre family or with young kids and living and working in urban areas. A large proportion do not drive a car.

**Potential opportunities:** Compared to the average, members of this segment walk more due to necessity than preference. Actions could focus on making walking a longer term habit (e.g. into later life or if a car is acquired) by raising appreciation of the benefits and improving the experience so that it becomes a preferred choice over the car.

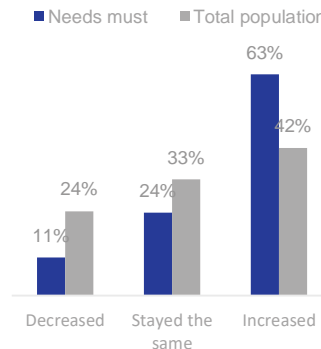
### Participation in walking (last month)



### Attitudes to walking



### Change in walking participation in last 5 years



### Most likely to be found amongst...

- Gen Z and Millennials (aged 16 to 24 or 25 to 34)
- Working
- Pre children or young families
- Residents of urban areas
- Men
- Do not drive a car



## Looking to change



While members of this group walk fairly routinely, especially for leisure or shopping, the frequency that they take part is not as high as the Budding Enthusiast or Needs Must segments. Also a larger than average share of this group have not changed their levels of walking participation in the last 5 years.

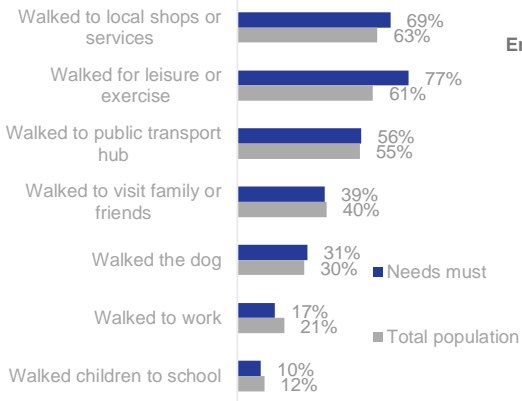
However the positive attitudes to walking amongst this groups, especially in relation to health benefits and preferring to walk than drive are notable and suggest that many in this group would like to walk more if they could.

Furthermore although this segment has the highest levels of car access, they are also the group most likely to state that they would walk more often if they had someone to walk with, better signage and felt safer.

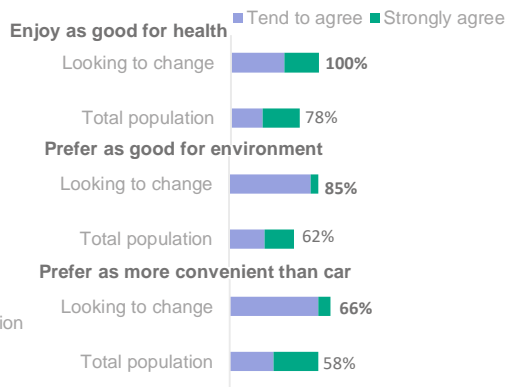
This segment is present across a range of demographics but are marginally more likely to be found amongst people who are working, more affluent socio economic groups, women and residents of urban areas.

**Potential opportunities:** This group could be targeted with initiatives which communicate how they can change their behaviour by making more frequent journeys on foot and fewer by car. This could include raising awareness of local path networks and public transport options and emphasising health benefits of walking over of driving.

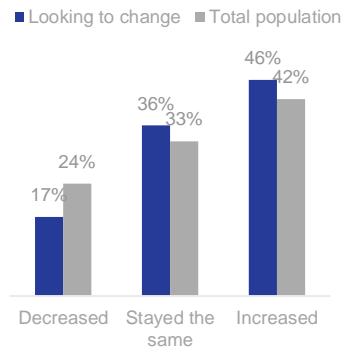
### Participation in walking (last month)



### Attitudes to walking



### Change in walking participation in last 5 years



### Most likely to be found amongst...

- People who drive a car
- Working
- More affluent social classes
- Women
- Residents of urban areas



## Reluctant rejectors



**11% of Scottish population**

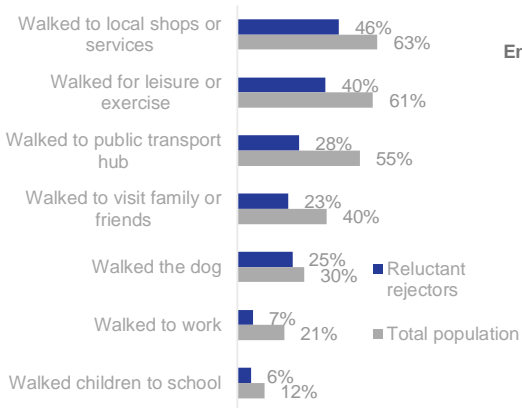
This segment are unlikely to walk regularly for either leisure or other purposes such as getting to shops, work or to visit family or friends. They also have the most negative attitudes to walking of all of the segments especially in relation to the potential environmental benefits or the convenience of walking over driving.

Around half have decreased their frequency of walking in the last 5 years. Nothing would encourage many in this group to walk more often while a larger than average proportion would like to see more convenient car access to retail parks. This group are also the least likely to have seen or heard any marketing regarding walking.

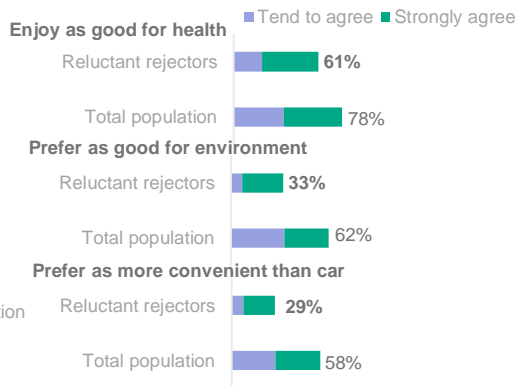
Members of this segment are more likely to be found amongst older age groups (55+, baby boomers), members of the lower socio economic groups and residents of rural areas. Car ownership levels are around average for this segment.

**Potential opportunities:** Given their negative views towards the benefits of walking and potential to walk more, increasing levels of participation could be harder amongst this group than others. However potential still exists, such as raising awareness of community path networks and opportunities to walk to local facilities and the health benefits this could bring for this slightly older group.

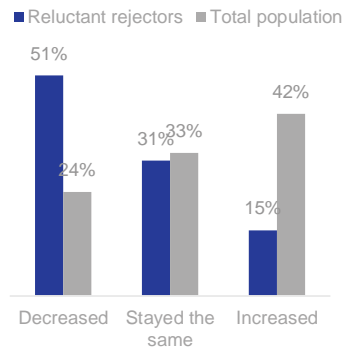
### Participation in walking (last month)



### Attitudes to walking



### Change in walking participation in last 5 years



### Most likely to be found amongst...

- Baby boomer generation (in 50s and 60s)
- People who are not working
- People with no children at home
- Less affluent social classes
- Residents of rural areas.



## Age and health restricted



Members of this segment are the least likely to walk regularly, often limited by health and age related issues while their attitudes to walking suggest a lack of interest/relevance.

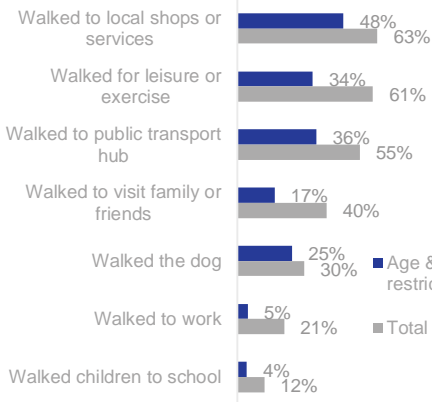
While members of this segment might walk to a local shop for necessities they would generally prefer to be able to live somewhere where it is convenient to drive to town. This group also makes fairly limited use of public transport compared to other segments.

During the last 5 years members of this segment were the least likely to have changed walking frequency suggesting that many have longer term health issues impacting on their ability to walk frequently. Most of the rest of the group are walking less than before.

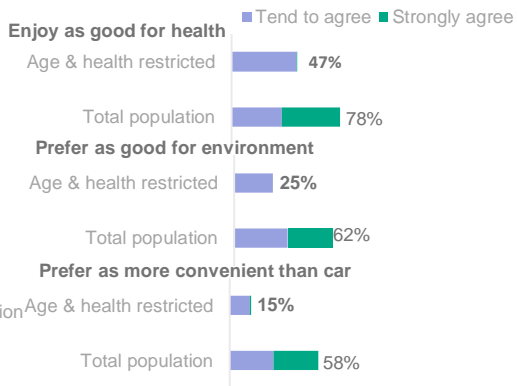
Members of this segment are more likely to be found amongst the oldest age groups.

**Potential opportunities:** While members of this segment walk infrequently and are likely to be walking less than previously, support could help them to gain confidence to be able to take part in organised health walks and other 'gentle' walking which could provide health and social benefits.

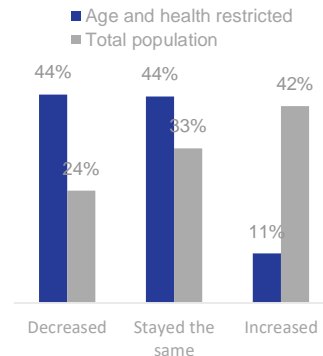
### Participation in walking (last month)



### Attitudes to walking



### Change in walking participation in last 5 years



### Most likely to be found amongst...

- Oldest age groups
- People who are not working (including retired)
- People with no children at home





# Insights, implications and actions



## Insights, implications and actions

Insight	Implications and actions
<p>Most Scot walk on a regular basis for a variety of reasons. However levels of participation and reasons for walking vary across the population and tend to be lower amongst older people, residents of rural areas, people who can drive and residents of the most deprived areas. The population segmentation included in this report provides a possible new perspective to add understanding to these variations and how to target messages that reflect attitudes as well as behaviours.</p>	<p>Initiatives which aim to increase walking need to be targeted appropriately taking account of both demographics and attitudes. For example, this could involve more focused communications to the least active groups who feel unable to walk to highlight opportunities to join organised health walks. However those people who would like to walk more yet don't due to their habit of 'jumping in the car' could benefit from more information on their local path and public transport options allowing them to see how active travel is a viable and simple alternative.</p>
<p>Most Scots have a positive view towards walking, in particular the health and wellbeing benefits it can bring. However appreciation of the environmental benefits is lower and appears to be an 'after thought' or secondary benefit when people are choosing whether to walk.</p>	<p>With increasing levels of concern for the environment, rising coverage of the climate change crisis and changing government policy to make Scotland carbon neutral, there is an opportunity to make Scots more aware of the environmental benefits of walking. The focus of communications could be made more relevant and personal by combining messaging about global benefits with local benefits (e.g. air quality, noise, safety and wildlife in their local area).</p>
<p>With two in five Scots claiming that they walk more often than 5 years ago, overall levels of walking in Scotland are increasing. The Scottish Household Survey shows a corresponding upward trend in recreational walking over the last 10 years. The upward trend is strongest amongst younger age groups, men and more affluent social classes. Seeking health benefits is one of the biggest drivers.</p>	<p>While the increase in good news it has some implications. The greatest increases tend to be amongst those who already walk most often while there is less change for groups such as those aged 65+ and less affluent people. This could lead to increasing health inequalities, especially given the ageing population. These results reinforce the need to target public sector initiatives at the groups who feel least able to walk due to age, illness or a lack of opportunities.</p>
<p>Many of the population agree that changes such as having someone to walk with, feeling safer when walking at night and improved pavements and paths would increase their likelihood of walking more often. Women are particularly likely to state that this is the case.</p>	<p>These findings suggests that there is a latent demand to walk more often if these types of change were made and/or if awareness of opportunities can be increased. The greatest opportunities exist amongst women and the segment identified as 'Looking to change'.</p>



## Insights, implications and actions

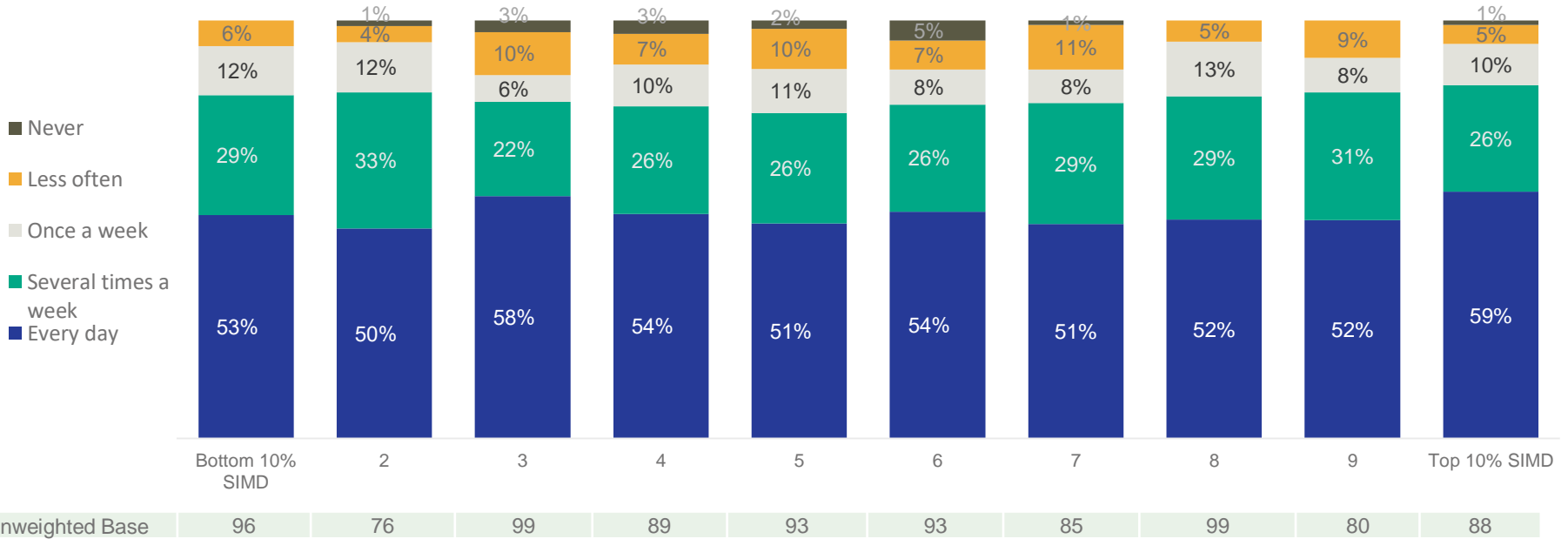
Insight	Implications and actions
<p>Most of the population are unwilling to walk for more than around 10 minutes to reach local shops that sell necessities or public transport links but on average would walk slightly further to get to their local greenspaces or their children's primary school.</p>	<p>In promoting walking we need to be conscious of the short distances that people are willing to walk for. While we may walk for longer for recreation purposes (Scottish Household Survey data suggests that many of us do), for many people to walking as part of a busy routine, as part of a journey to and from work or study or to buy everyday essentials 'needs' to take up less time.</p>
<p>When asked about their priorities if they were moving house, being able to walk to local shops and other amenities was more important for most people than convenience by car.</p> <p>Yet many people say that that where they currently live the places that they would like to walk to such as shops, public transport and schools are out of reach.</p> <p>Ratings of local walking 'conditions' and the accessibility of facilities vary greatly across the population suggesting significant differences by local area.</p>	<p>There are a number of potential implications and actions. In some cases the proximity of local facilities may in reality be closer than people know so action is needed to raise awareness of path networks, public transport networks etc. If information is combined with messages on health and environmental benefits this may encourage some people to 'make the effort' to switch to walking for some journeys or to walk for a little bit longer. In other situations there may be a need to improve the opportunities for walking in local areas by addressing issues relating to the condition of existing paths and pavements, continuing to support the provision of new path networks and public transport links and working with developers to ensure that they recognise the importance of active travel in the design of new developments.</p>
<p>Just over half of Scots had walked to a public transport link in the last month as part of a longer journey. This was much higher amongst younger people, those with no access to a car and those likely to be commuting regularly in urban areas.</p>	<p>There may be opportunities to work with transport operators to increase the appeal of public transport amongst older age groups, those who don't commute to work and those people who will get access to car in the near future. This could relate to both routine journeys such as commuting and journeys for leisure at off peak times. To outweigh the perceived benefits of 'jumping in the car' public transport options must be seen as equally or more convenient.</p>
<p>Around two in five Scots have recently seen or heard any marketing or other communications regarding walking and cycling. Messages regarding health benefits were most likely to be seen or heard and a wide range of communications channels were recalled, varying by age.</p>	<p>As referenced above more targeted communications would be beneficial with messaging continuing to emphasise the health benefits but also the ease and environmental importance of travelling less by car. A multi channel approach is needed to reach the different audiences and to reinforce messaging.</p>



# Appendix – additional analysis of results by SIMD decile

## Key results by Scottish Index of Multiple Deprivation

FIGURE 26 Frequency walk for any purpose by SIMD





## Key results by Scottish Index of Multiple Deprivation

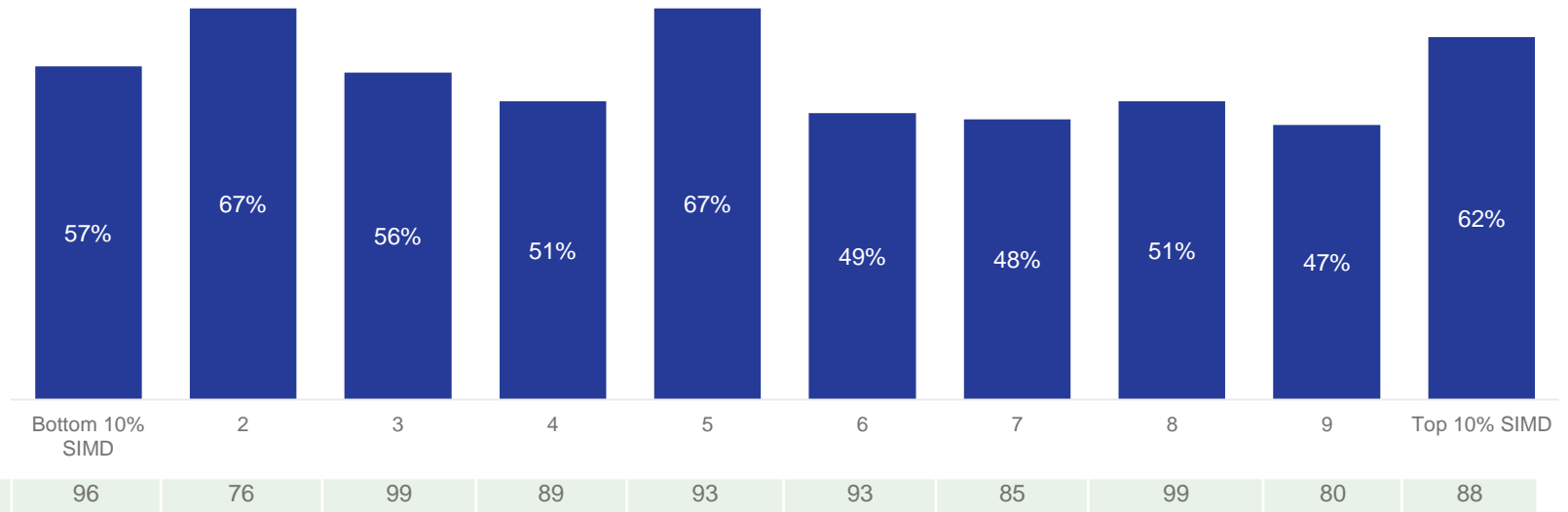
FIGURE 27 – Walking in the last month by key SIMD

	Bottom 10% SIMD	2	3	4	5	6	7	8	9	Top 10% SIMD
Walked to local shops or services	72%	67%	71%	62%	62%	56%	67%	63%	60%	58%
Walked for leisure or exercise	58%	55%	63%	55%	61%	63%	62%	59%	72%	70%
Walked to visit family or friends	40%	49%	51%	34%	42%	37%	39%	38%	30%	36%
Walked the dog	33%	30%	21%	25%	25%	33%	29%	35%	33%	33%
Walked to work	16%	19%	26%	25%	19%	17%	18%	22%	19%	27%
Walked children to school	14%	17%	8%	9%	12%	10%	12%	12%	12%	14%
<b>ANY OF THE ABOVE</b>	<b>97%</b>	<b>99%</b>	<b>92%</b>	<b>91%</b>	<b>91%</b>	<b>94%</b>	<b>94%</b>	<b>95%</b>	<b>99%</b>	<b>93%</b>
<b>Unweighted Base</b>	<b>96</b>	<b>76</b>	<b>99</b>	<b>89</b>	<b>93</b>	<b>93</b>	<b>85</b>	<b>99</b>	<b>80</b>	<b>88</b>



## Key results by Scottish Index of Multiple Deprivation

FIGURE 26 – Proportion of population who walked to public transport link in last month in total and by SIMD



This research was undertaken by 56 Degree Insight on behalf of Paths for All.

Paths for All is a partnership organisation; for a full list of our current partners please visit our website <http://www.pathsforall.org.uk>

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