

*Traffic Orders & 20mph
Public Attitudes Survey*

November 2020 Wales Omnibus Study



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Traffic Orders and 20mph Public Attitudes Survey – November 2020 Wales Omnibus

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1. Introduction and objectives

The Welsh Government plans to introduce legislation in 2023 which will reduce the speed limit from 30 mph to 20 mph in residential communities across Wales. There is evidence that lower speeds result in fewer collisions and a reduced severity of injuries, as well as bringing environmental benefits by decreasing emissions from vehicles and by encouraging active travel.

Beaufort was therefore commissioned by the Welsh Government to assess public attitudes towards the change and to provide baseline data for a public awareness campaign ahead of the legislative change.

Other areas of interest explored in the survey, in less detail, were public attitudes towards pavement parking and publicity channels for Traffic Regulation Orders.

2. Methodology

The survey was conducted on the November 2020 Beaufort Wales Omnibus which interviews a representative quota sample of adults aged 16 and over across Wales.

Omnibus surveys are a well-established method of conducting market and social research. As their name implies, they enable a group of users to share the same survey vehicle, achieving the benefit of lower costs. Subscribers to an omnibus service buy in on the basis of how many questions they wish to ask of the sample and the type of questions. In effect, therefore, each subscriber shares the cost of interviewing and other overheads with fellow clients.

The COVID-19 public health crisis prevented the survey from being carried out in its usual manner of face-to-face interviewing at selected sample points throughout Wales. Instead interviews for the November 2020 survey were undertaken online, using the Cint™ online panel exchange platform.

The Cint™ platform and its products comply with ESOMAR, MRS, ARF, MRIA, AMA, AMSRO and Insights Association standards. Cint™ also complies with ISO 20252. Multiple data quality checks are built into the Cint™ system including GEO IP check and CAPTCHA at registration, unique respondent identification and fraudulent behaviour checks. On top of this Beaufort builds in its own quality control questions and measures within the survey and excludes respondents who fail these checks.

The survey was subject to interlocking demographic quota controls of age within gender. A further separate quota control was set on social grade and interviews were undertaken with residents of every local authority in Wales. At the analysis stage, the data was weighted by age group, gender, local authority grouping and social grade to match Census 2011 figures and ensure it was representative of the Wales population.

The questions for the survey are included in Appendix 1. Demographic questions are also included as standard in the Wales Omnibus survey. The questionnaire was available in English or Welsh at the participant's choice.

1,002 adults were interviewed online between 9 to 29 November 2020.

Full data tabulations from the survey have been provided to the Welsh Government in a separate technical report.

3. Research findings

3.1 Traffic Regulation Orders

The first questions focused on Traffic Regulation Orders (TROs). Participants were asked to think about changes to the road network in their area, for example road closures, road works or new parking restrictions. They were informed that there is a statutory requirement for the local Council to make road users aware of any changes in advance through three specified methods:

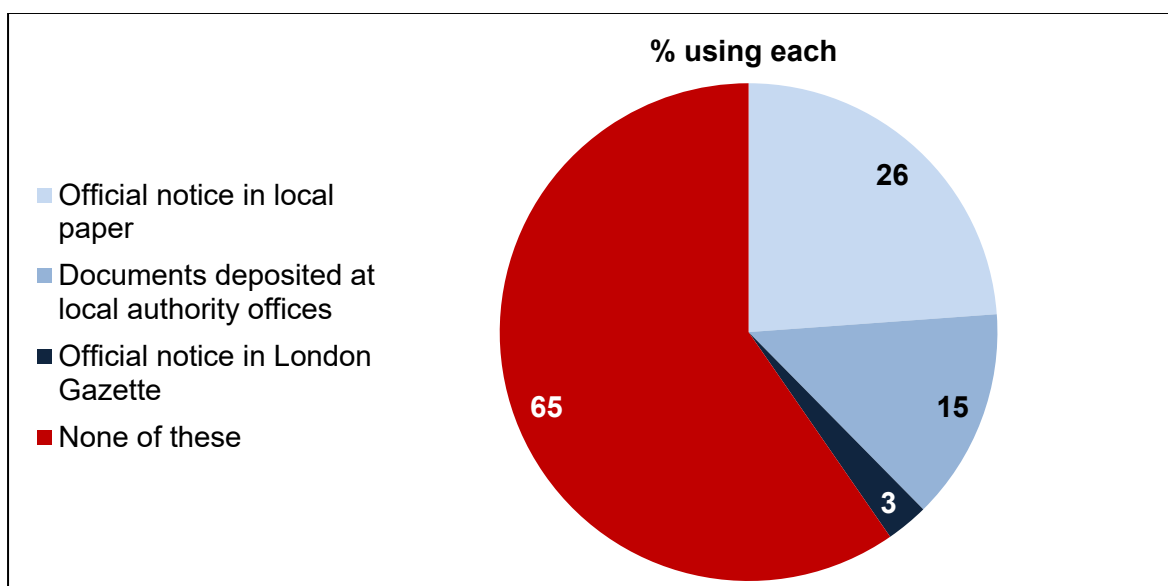
1. An official notice in the local newspaper
2. An official notice in the London Gazette, and
3. Depositing the documents in the local authority offices (that is, making them available for inspection by the public at the Highways Department).

Participants were then asked which, if any, of these they had ever seen or used.

The most commonly-used of the three TRO publicity channels was a notice in the local press, which around one in four of the public (26%) said they had seen or used. Another 15% had seen or used documents deposited with the local authority while only 3% had seen or used an official notice in the London Gazette.

Almost two-thirds of the Welsh public (65%) had never used any of these methods to find out about changes to the road network in their area (see figure 1).

Figure 1: Which of these methods have you ever seen or used?

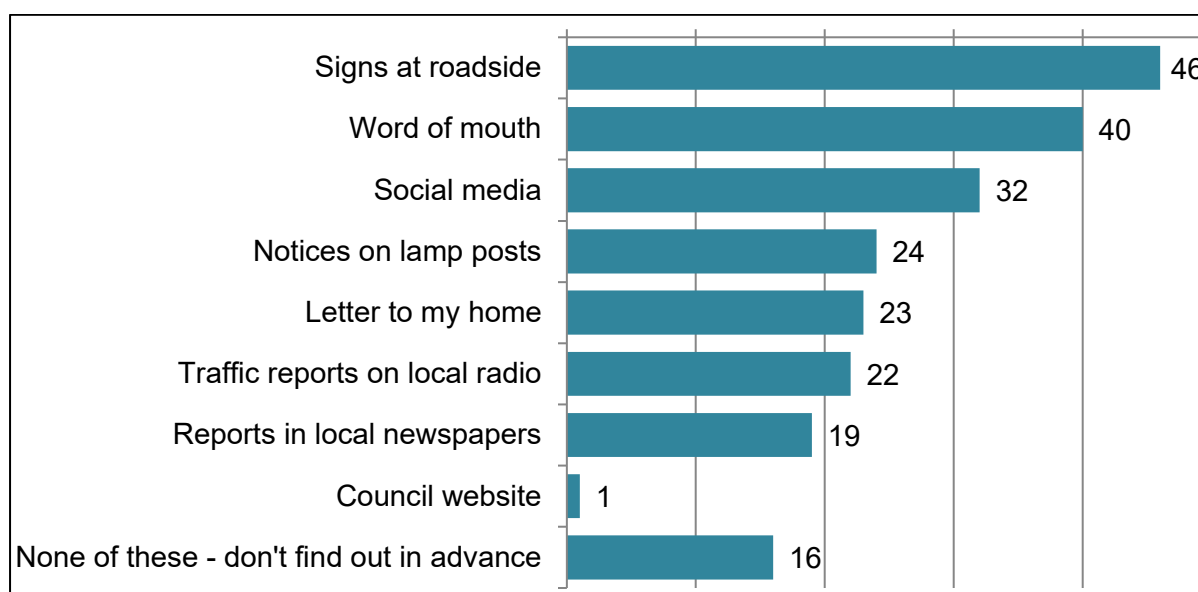


Base: all respondents (1,002)

When asked how else, if at all, they found out about changes to the road network in their area, almost half (46%) said through signs at the roadside, while another four in ten mentioned word of mouth and around a third (32%) social media. All these channels were more widely used than any of the official publicity channels.

Additional sources of information mentioned by around one in four to one in five of the public interviewed were notices on lampposts, letters to their home, traffic reports on local radio and reports in local newspapers (see figure 2).

Figure 2: How else, if at all, do you find out about changes to the road network in your area?



Base: all respondents (1,002)

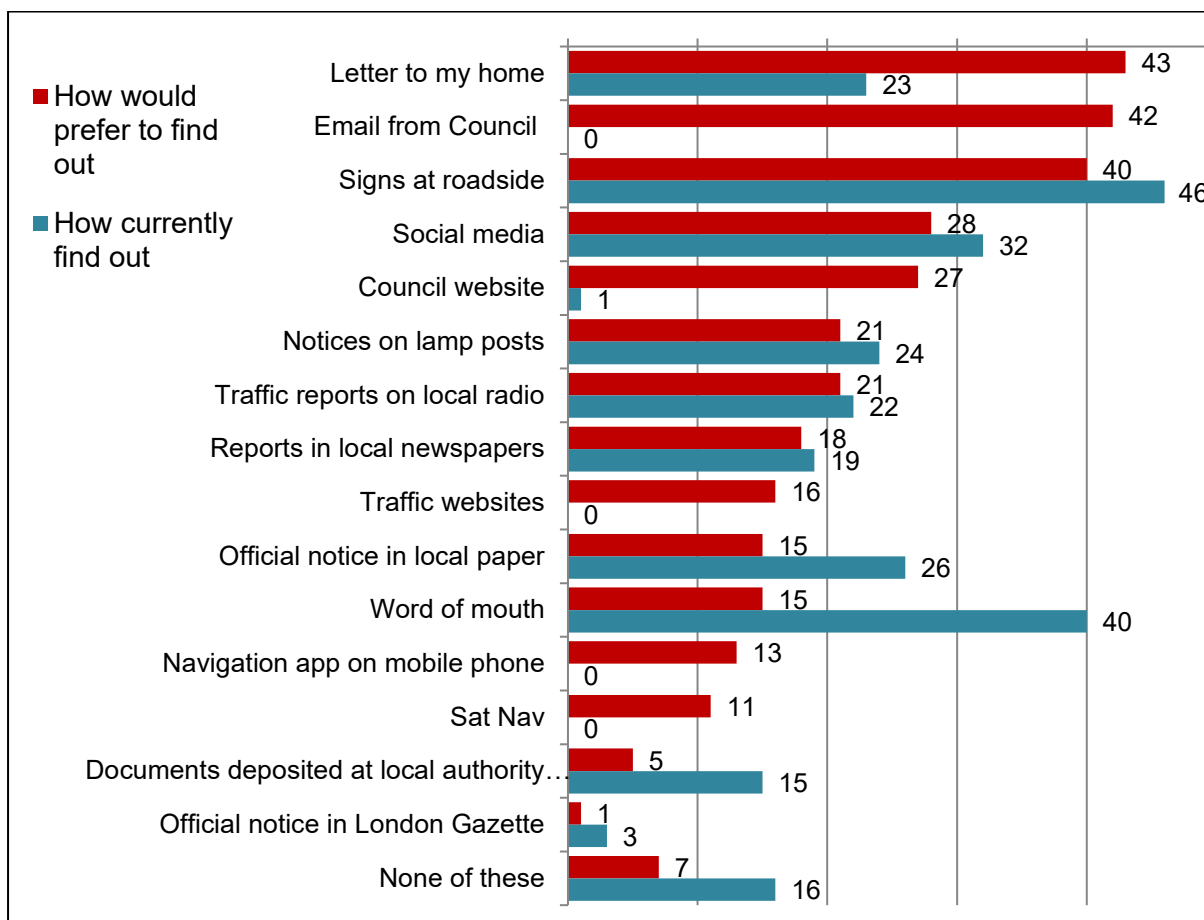
Participants were then shown a list of communication channels (including the current statutory channels) and were asked how they would **prefer** to be informed about changes to the road network in their area in future.

The public's preferred sources of information for the future were letters to their home and emails from the Council (chosen by 43% and 42% of adults respectively). Another four in ten chose signs at the roadside and just under three in ten mentioned social media and the Council website (see figure 3).

Although word of mouth was one of the most commonly-mentioned current sources of awareness of changes to the road network, it was much less popular as a preferred source of information.

All three statutory TRO publicity channels were preferred by fewer people than currently used them.

Figure 3: In future, in which of the following ways would you prefer to be informed about changes to the road network in your area?



Base: all respondents (1,002)

3.2 20 mph speed limits

3.2.1 Concerns about roads and road safety

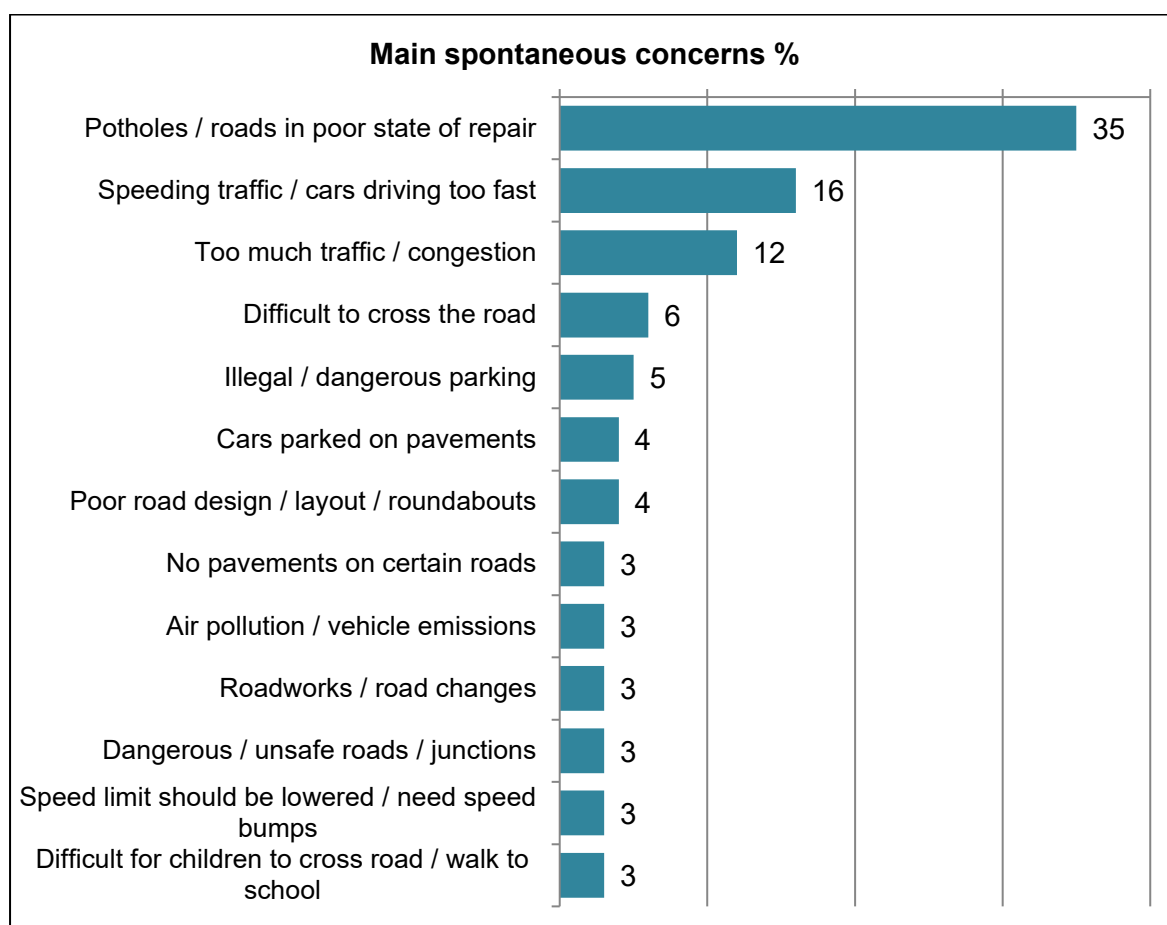
Around three in ten Welsh adults (31%) had spontaneous concerns about local roads and road safety and getting about where they lived. This rose to almost four in ten (38%) of those with a long-term limiting illness, health problem or disability.

When asked what concerns they had, the main issues mentioned unprompted were:

- The **poor state of repair** of local roads (mentioned by 35% of those with concerns), and
- **Speeding traffic** / cars driving too fast (at 16% of those with concerns). Another 3% called for the speed limit in their local area to be lowered.

Illegal or dangerous parking was mentioned by 5% of those with concerns and pavement parking was cited by 4% (see figure 4).

Figure 4: What concerns do you have about roads and road safety and getting about where you live?



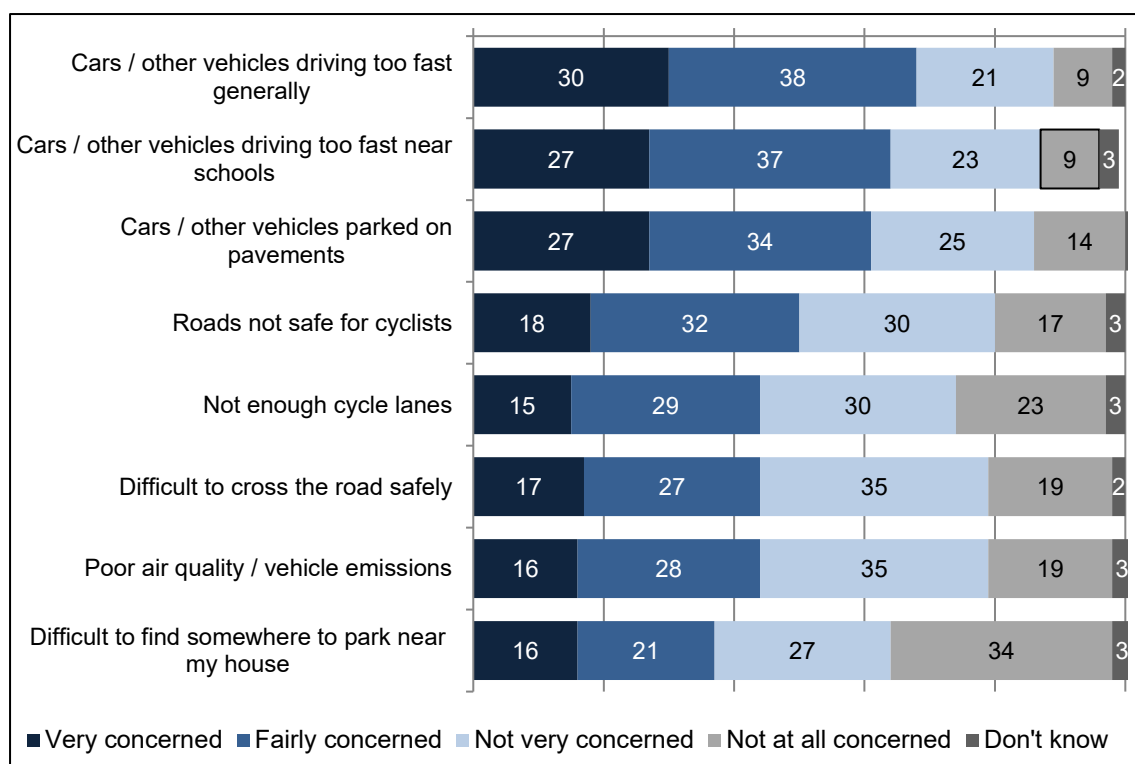
Base: those expressing concerns about roads and road safety and getting about where they live (298)

All survey participants were then prompted about different issues and were asked how concerned they were, if at all, about each of these.

The main concerns were as follows:

- Almost seven in ten Welsh adults (68%) were very or fairly concerned about cars or other vehicles **driving too fast generally** (rising to 73% of those with children aged under 16 in their household)
- Over six in ten (64%) were very / fairly concerned about cars or other vehicles **driving too fast near schools** (rising to 72% of those with children in their household)
- Six in ten were very / fairly concerned about cars **parked on pavements** (rising to 69% of those with babies or young children aged 6 or under at home)
- Almost half overall (49%) were very / fairly concerned that **roads were not safe for cyclists** (rising to 67% of those who cycle regularly for local journeys).

Other prompted concerns were at a lower level – see Figure 5.

Figure 5: How concerned are you about the following issues? (%)

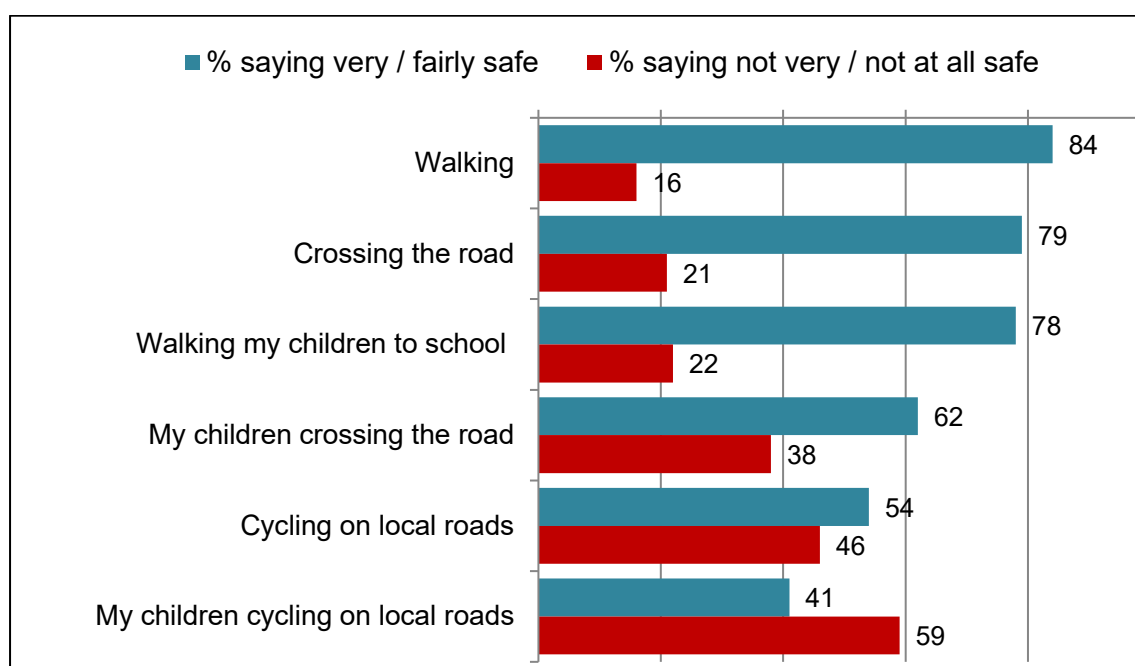
Base: all respondents (1,002)

Those interviewed were asked about their perceptions of how safe they (or their children) were when using roads around where they lived. Figure 6 shows the percentage of participants able to give an answer (that is, excluding those answering 'don't know' or 'not applicable') who felt safe and unsafe when using local streets as a pedestrian or cyclist.

It illustrates that the great majority of those expressing an opinion (around eight in ten) felt safe walking in their local area, crossing the road and walking their children to school; a minority of around one in five did not feel safe in each of these situations, however.

Although just over six in ten felt their children were safe crossing the road locally, a sizeable minority of almost four in ten (38%) did not.

Opinion was split almost evenly regarding cycling on local roads – while just over half of those who expressed an opinion felt safe doing this (54%), almost as many (46%) did not. Moreover, those who felt their children were safe cycling on local roads were outnumbered by those who did not (at 41% to 59% respectively)

Figure 6: How safe do you feel when doing the following where you live...?

Base: all respondents (1,002); rebased to exclude those answering 'don't know' and 'not applicable' so base varies per dimension

3.2.2 Views on speed limits and reaction to a 20 mph speed limit

When asked what the speed limit was on their street, most participants (60%) said it was 30 mph. Around one in four (26%) said it was 20 mph, rising to 36% of those living in Cardiff and South East Wales.

Most Welsh adults (61%) were content with the current speed limit for their street, while around a third (34%) were not. The proportion saying that they did not feel their street had the right speed limit rose to 44% where the current speed limit was 30 mph, and fell to 14% where the current speed limit was 20 mph.

When those who did not feel their street had the right speed limit were asked what they would like it to be, over nine in ten of those who would like to see a change (92%) spontaneously suggested 20 mph or lower.

The great majority of those who wanted a different speed limit in their street (77%) would like to see this speed limit applied throughout the area in which they lived.

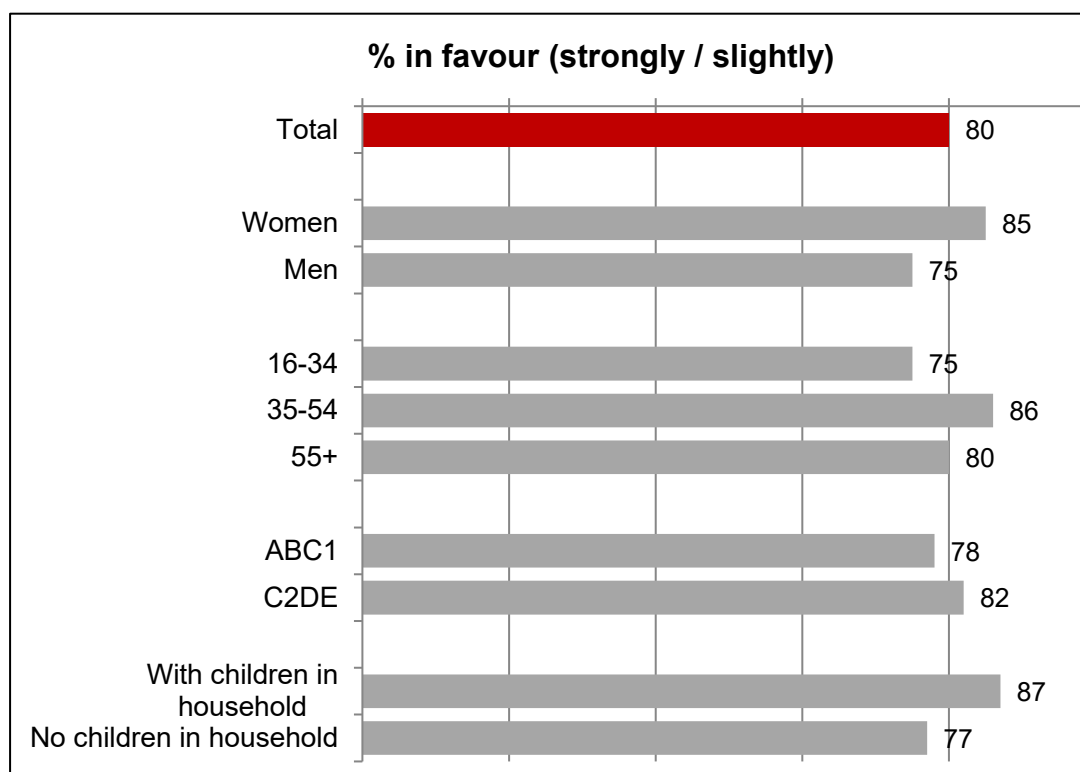
All participants were then asked directly whether they would support a speed limit of 20 mph in the area in which they lived. Four in five Welsh adults (80%) said they would, compared to one in five (20%) who would not.

Women, those with children at home and those in the DE¹ socioeconomic groups were most likely to support a 20 mph speed limit (at 84% of each group, compared with 80% of adults overall). Conversely, those mostly likely to be opposed were men, those aged 65 and over and those in the AB socioeconomic groups (at 25%, 24% and 23% of each group respectively, compared with 20% of adults overall). Even so, the majority of each of these groups was in favour of a 20 mph speed limit.

When it was explained the Welsh Government was planning to reduce the speed limit from 30 mph to 20 mph in residential communities across Wales, 80% of Welsh adults said they were in favour of the plan, with over half overall (54%) strongly in favour. Fewer than one in five (17%) were against the proposal.

Those with children at home were most likely to be in favour (at 87% compared with 80% overall). Women, those aged 35-54 and those in the C2DE socioeconomic groups were also more likely than average to be in favour (see figure 7).

Figure 7: What's your view on the plan to reduce the speed limit to 20 mph in residential communities across Wales?



Base: all respondents (1,002)

¹ Socio-economic classification is determined by establishing an individual's job title and position and social grades are defined as follows:

AB: Higher and intermediate managerial, administrative and professional occupations

C1: Supervisory, clerical and junior managerial, administrative and professional occupations

C2: Skilled manual workers

DE: Semi-skilled and unskilled manual workers, state pensioners, casual and lowest grade workers, unemployed with state benefits only

Those who were in favour and those who were against reducing the speed limit to 20 mph were asked why they felt this way.

Among those **supporting the idea**, the principal spontaneous reasons given were that:

- it would be safer generally (mentioned by 18% of those in favour)
- there was too much speeding at the moment (13%)
- it would be safer for children (12%)
- it would save lives (10%), and
- it would prevent accidents (9%).

A list of the main reasons given is shown in Table 1 below:

Table 1: Main reasons for being in favour of reducing the speed limit to 20 mph	
%	
Safer / less dangerous (generally)	18
Too much speeding / people drive too fast	13
Safer for children / children playing	12
Will save lives / reduce fatalities in accidents	10
Will reduce / prevent accidents	9
Safer for pedestrians / residents / the community	7
Will make the area / streets / roads safer	6
20 mph / slower is better	5
Depends on the location / area / not acceptable everywhere	4
Will reduce speeding / slow drivers down	4
Lots of children / schools in my area / children playing in street	4
Safer for older people	4
Good for environment / will reduce emissions	3
Gives drivers more time to react / deal with hazards	3
Base: those in favour of reducing the speed limit to 20 mph (802)	

The primary reasons given by those who were **against the reduction in the speed limit to 20 mph** were that:

- they considered 20 mph to be too slow (mentioned by 18% of this group)
- there was no need for the reduction (17%)
- it was only necessary in certain areas / locations (17%), and
- it would cause congestion / traffic jams (15%).

Table 2 lists the main spontaneous reasons given:

Table 2: Main reasons for being against reducing the speed limit to 20 mph

%	
20 mph is too slow	18
No need for it / unnecessary	17
Depends on area / location / not necessary everywhere	17
Will cause congestion / traffic jams	15
People won't stick to it / pointless	7
It's difficult to drive at 20 mph / car won't do 20 mph	6
Travel / journey times will increase	5
Could lead to drivers becoming frustrated / distracted	5
Not needed if you drive safely / according to road conditions	5
30 mph is the right speed limit / slow enough to be safe	5
Will cause pollution / more vehicle emissions	4
It won't be enforced / difficult to enforce	4
Negative comments, e.g. stupid, ridiculous, silly	3
Base: those against reducing the speed limit to 20 mph (172)	

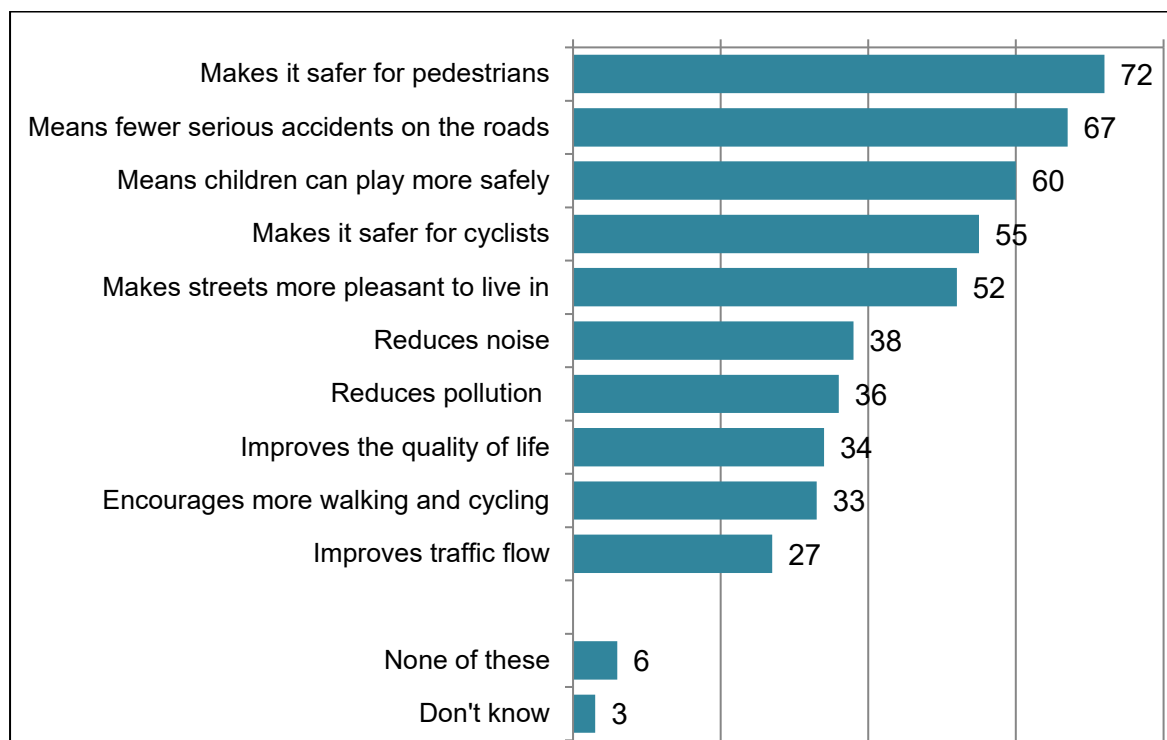
All those interviewed were then shown a list of possible reasons why people might **support 20 mph** speed limits. They were asked which, if any, they agreed with.

The highest levels of endorsement were for it *Makes it safer for pedestrians* and it *Means fewer serious accidents on the roads* (with an agreement level of around seven in ten). Around six in ten Welsh adults agreed that it *Means children can play more safely* and it *Makes it safer for cyclists*, while just over half agreed that it *Makes streets more pleasant to live in*.

Between around three in ten and four in ten participants agreed with each of the other prompted reasons, including it *Reduces noise* (at 38% agreement) and it *Reduces pollution* (at 36% agreement).

Only 6% of Welsh adults did not endorse any of the reasons why people might support 20 mph speed limits.

Figure 8: Here are some reasons people might support 20 mph speed limits. Which of these do you agree with?



Base: all participants (1,002)

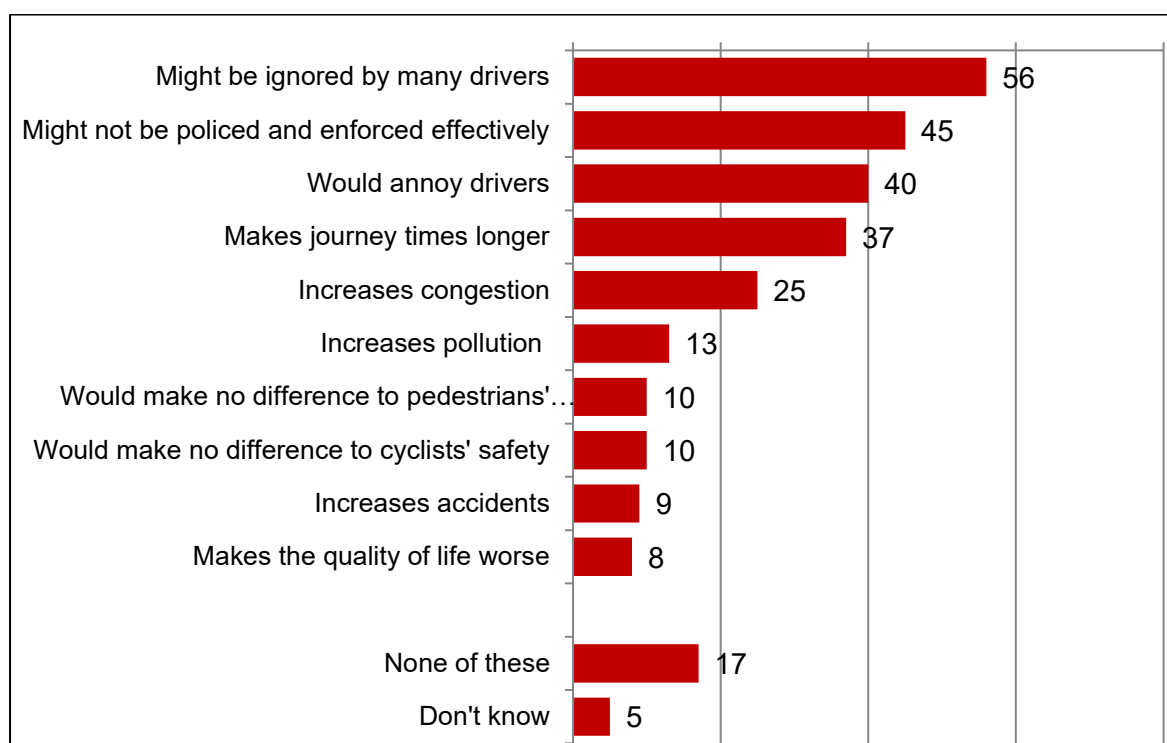
When prompted with reasons why people might **oppose 20 mph** speed limits, the highest endorsement (from almost six in ten Welsh adults) was that it *Might get ignored by many drivers* and (from almost half) that it *Might not get policed and enforced effectively*.

Around four in ten adults agreed that it *Would annoy drivers* and that it *Might make journey times longer*, while one in four agreed that it *Increases congestion*.

All other reasons were endorsed by around one in ten adults or fewer.

Just under one in five participants (17%) did not agree with any of the reasons why people might oppose 20 mph speed limits (see figure 9):

Figure 9: Here are some reasons people might oppose 20 mph speed limits. Which of these do you agree with?



Base: all participants (1,002)

3.2.3 Impact of 20 mph speed limit on active travel

Survey participants were also asked about the difference, if any, 20 mph speed limits might make to their personal behaviour. They were asked whether 20 mph speed limits would make them more or less likely to:

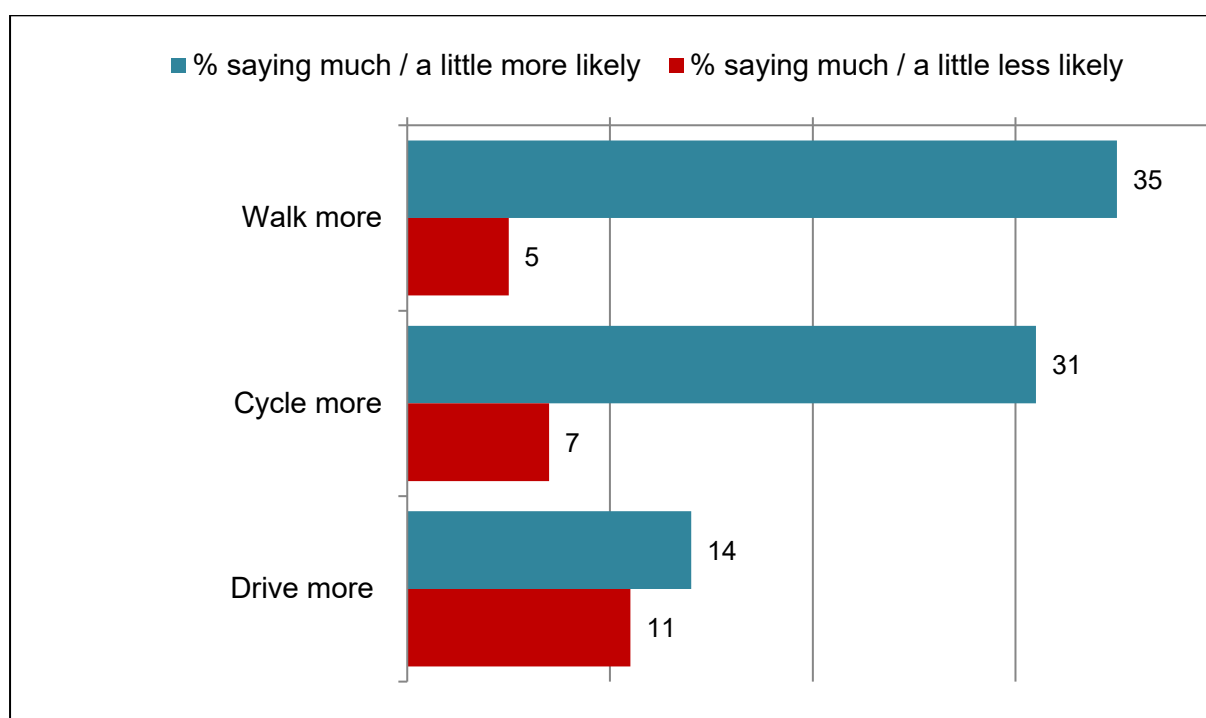
- Walk more
- Drive more, and
- Cycle more.

One in three Welsh adults said that 20 mph speed limits would make them more likely to walk more, while around one in five (22%) said that they would be more likely to cycle more. The proportions who said they would be less likely to walk or cycle more if the speed limit were 20 mph were much smaller (at 5% and 7% respectively).

The situation with driving was more mixed. 11% said they would be more likely to drive more if the speed limit were 20 mph, while a similar proportion (9%) said they would be less likely to drive more in this situation.

Among Welsh adults who expressed an opinion (that is excluding those who said it was not applicable to them or who were unable to answer), the proportions saying they would be more likely to walk more and cycle more rose to 35% and 31% respectively (see figure 10):

Figure 10: Can you tell me what difference 20 mph speed limits might make to you personally – would they make you more or less likely to do the following...?



Base: all respondents (1,002); rebased to exclude those answering 'don't know' and 'not applicable' so base varies per dimension

Those most likely to say they would be **more likely to walk more** with 20 mph speed limits were:

- **young people** (at 46% of 16-24s and 40% of 25 – 34s, compared to 33% of all adults)
- those **with children under 16 in their household** (at 41%)
- those living in **Cardiff and SE Wales** (at 37%)
- those from **BAME** groups (at 51%).

Those most likely to say they would be **more likely to cycle more** with 20 mph speed limits were:

- **young people** (at 31% of 16-34s compared to 22% of all adults)
- **men** (at 25%, compared with 19% of women)
- those in the **ABC1** socioeconomic groups (at 24%, compared to 20% of C2DEs)
- those **with children in their household** (at 31%)
- regionally, those living in **Mid / West Wales** and **Cardiff and SE Wales** (at 26% and 25% respectively)
- those from **BAME** groups (at 41%).

3.2.4 Attitudes towards 20 mph speed limits

Towards the end of the survey, participants were presented with a series of statements to gauge attitudes towards a 20 mph speed limit and the issue of pavement parking. They were asked to what extent they agreed or disagreed with each statement, using a scale of strongly agree, agree, neither agree nor disagree, disagree and strongly disagree. A 'don't know' option was also provided.

Reflecting the high level of concern over pavement parking seen earlier in the survey, there was strong endorsement that *Cars parked on pavements are a real problem for pushchair and wheelchair users*, with around eight in ten agreeing with this statement.

Agreement was also high (at around seven in ten of those interviewed) that:

- *There needs to be proper enforcement by the police for 20 mph limits to work*
- *I wish everyone would slow down a bit on the roads*
- *Streets would be a lot nicer for pedestrians with a 20 mph speed limit, and*
- *If 20 mph limits were introduced most drivers would not stick to them.*

Less emphatic agreement was evident that *People's driving habits would change if 20 mph limits were introduced*. Just over four in ten adults interviewed (42%) agreed with this, while almost one in four (23%) were of the opposite opinion. 31% neither agreed nor disagreed with this statement.

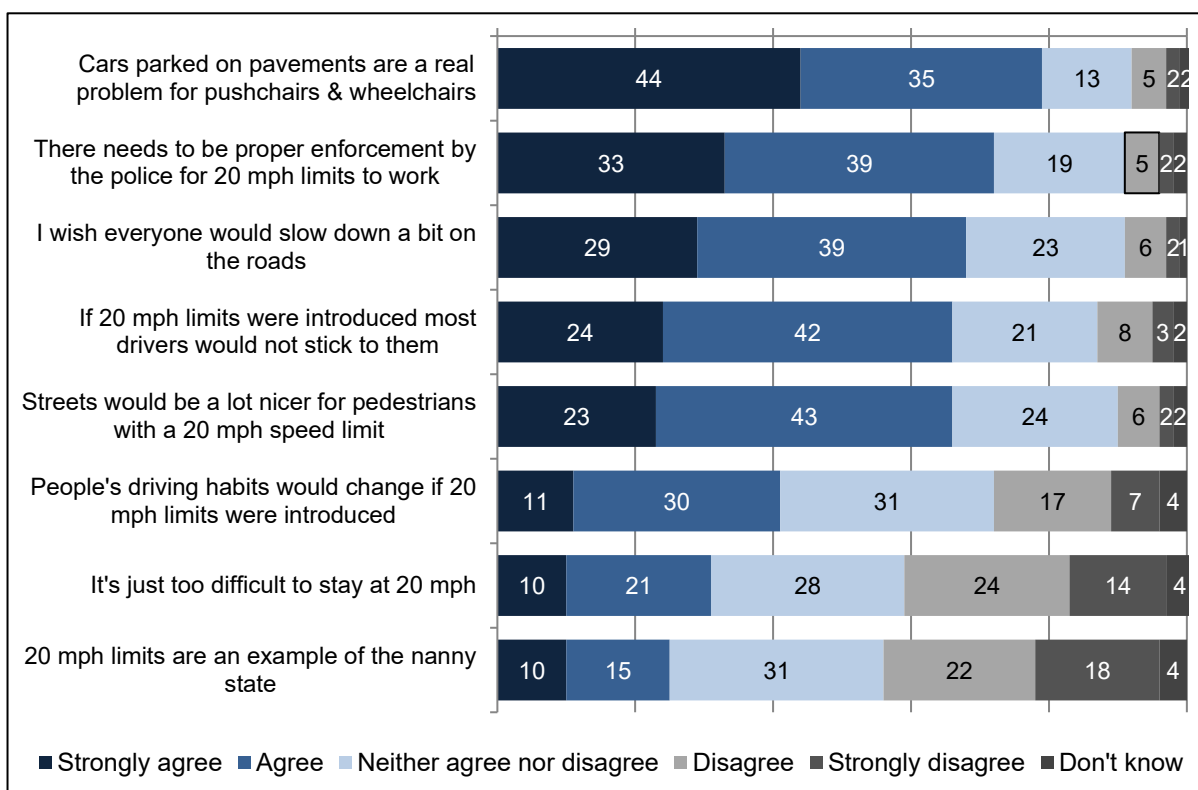
More adults disagreed than agreed that:

- *20 mph limits are an example of the nanny state* (40% disagreed, compared to 25% agreeing)
- *It is just too difficult to stay at 20 mph* (37% disagreed, compared to 32% agreeing)

Around three in ten were unable to give an answer to either of these statements.

Figure 11 provides a breakdown of responses to each statement.

Figure 11: Public attitudes towards 20 mph speed limits/ pavement parking - %



Base: all respondents (1,002)

3.2.5 Communications awareness

To provide a baseline measure for future communications activity, a question was included on awareness of marketing and communications about legislation to reduce the speed limit to 20 mph in Wales.

One in ten of those interviewed in November 2020 (10%) mentioned seeing or hearing some marketing, communications or advertising about legislation on this subject. While at this time no Welsh Government communications activity had taken place, there had been media coverage of the planned legislation and of associated activity such as debates in the Senedd. It is also typical to see some confusion with other advertising campaigns.

4. Summary and conclusions

The survey shows strong support among the Welsh public for the introduction of 20 mph speed limits in residential areas. Support is strongest among parents, women and those in the middle age range. The research also indicates that pavement parking is a concern for the majority of adults in Wales, especially for parents of babies and young children, the over 65s and disabled people.

Moreover, the introduction of 20 mph speed limits has the potential to encourage take up of active travel, with sizeable proportions of the public saying that they would be more likely to walk more and cycle more if the speed limit locally were 20 mph. Young people and parents were particularly likely to say that their walking and cycling locally would increase.

In the survey high proportions of the public expressed concerns about vehicles driving too fast generally, driving too fast near schools and about cars parked on pavements. Those with children at home (particularly young children, in the case of pavement parking) were most likely to be concerned about these issues.

What's more, while most people felt their children were safe crossing the road locally, almost four in ten did not, and around one in five did not feel safe walking their children to school. Concerns over cyclists' safety on local roads were even higher. Almost half of those with an opinion did not feel safe cycling in the area in which they lived, while around six in ten did not feel their children were safe cycling on local roads.

Safety therefore is the strongest motivator for supporting the reduction in the speed limit in residential areas across Wales, particularly for pedestrians, children and cyclists. Speeding traffic emerged as the second biggest spontaneous concern of people regarding roads in their local area.

There is lower awareness or recognition of the environmental impact of any reduction in speed limits at the moment. Just over a third of adults agreed that a reduction in the speed limit to 20 mph would *reduce pollution*, compared with around seven in ten agreeing it *makes it safer for pedestrians* and *means fewer serious accidents on the roads*. The reduction in vehicle emissions is therefore less top of mind as a benefit of lower speed limits than safety.

The primary reservations of the public around the reduction in speed limits to 20 mph are around:

- Enforcement
- Changing drivers' behaviour
- Whether it might cause congestion / traffic jams.

The survey indicates that enforcement is regarded by the Welsh public as crucial to the success of the new policy – seven in ten adults feel there *needs to be proper enforcement by the police for 20 mph speed limits to work*. At the same time there is a great deal of scepticism over whether driver behaviour will change – two in three Welsh adults were of the opinion that *if 20 mph speed limits were introduced most*

drivers would not stick to them and around one in four disagreed that people's driving habits would change if 20 mph limits were introduced.

Overcoming concerns around enforcement will require a partnership approach with the police and safety camera partnerships to ensure that effective measures are in place across Wales to ensure compliance with the new speed limit. Other issues (such as concerns about traffic congestion) can be addressed through messaging in the communications campaign.

The research shows that certain groups within the population are less likely to support 20 mph speed limits - namely men, younger people and over 65s - so these groups need to be targeted in media planning for the campaign. Different channels are likely to be required to successfully reach these different demographics. For instance, the research indicates that men and the over 65s are most likely to read a UK daily newspaper, suggesting that press advertising might be an effective channel for targeting older people. Over 65s are also more likely than any other age group to watch commercial TV every day. Younger people, in contrast, are least likely to watch TV, listen to commercial radio stations or read newspapers regularly but are most likely to be heavy users of social media platforms such as Instagram.

For Traffic Regulation Orders, the data suggests that the statutory advertisement channels are no longer fit for purpose in terms of reaching members of the public. Only around a third of Welsh adults had ever seen or heard about changes to the local road network through any of the current statutory channels. They were much more likely to find out about road changes through road signs, word of mouth and social media. Preferences for the future, however, were for more targeted official communications rather than informal channels such as word of mouth and social media. Direct communication from the Council via an email or a letter to their home were the channels preferred by the highest proportion of the public.

The November 2020 survey results provide robust baseline data on key metrics such as support for 20 mph speed limits, attitudes towards the lower speed limit, campaign awareness and barriers / motivators to behaviour change. We recommend that these measures are tracked at regular intervals going forward, to monitor any changes in opinion and attitudes and assess the effectiveness of Welsh Government advertising and marketing. The frequency and timing of the research tracking will depend on the timing and weight of communications activity, but we would suggest that tracking should be carried out at least once a year, with the frequency stepped up around the campaign launch and the introduction of the new legislation.

Alongside the quantitative tracking and to inform messaging in the public communications campaign, we would recommend further in-depth research using qualitative techniques is carried out. This would be valuable in exploring attitudes and the motivators and barriers to driver behaviour change in more depth, particularly among those audiences who are least favourably disposed towards 20 mph speed limits. Focus group research would be useful, for example, among younger and older men, to develop a better understanding of their attitudes and enable targeted messages to be developed for these audiences.

Appendix 1 – Research Questionnaire

B02010-4 November Wales Omnibus

Welsh Government 20 mph / Traffic Orders Questions FINAL 29.10.20

PART I – Traffic Orders

Q1. Thinking now about changes to the road network in your area, for example road closures, road works or new parking restrictions. There is a statutory requirement for the local Council to make road users aware of any changes in advance through the following methods:

1. Documents deposited in the local authority offices (that is making them available for inspection by the public at the Highways Department)
2. Official notice in the local paper
3. Official notice in the London Gazette

Which of these methods, if any, have you personally ever seen or used?
Tick all that apply

Documents deposited in the local authority offices (that is making them available for inspection by the public at the Highways Department)
Official notice in the local paper
Official notice in the London Gazette

None of these

Q2. How else, if at all, do you find out about changes to the road network in your area? *Tick all that apply*

Letter to my home
Notices on lamp posts
Reports in local newspapers
Signs at roadside
Social media
Traffic reports on local radio
Word of mouth

Other (Please write in) _____

None of these – don't generally find out in advance (*Single code*)

Q3. In future in which of the following ways would you prefer to be informed about changes to the road network in your area? Tick all that apply

- Council websites
- Documents deposited in local authority offices (that is making them available for inspection by the public at the Highways Department)
- Email from the Council
- Letter to my home
- Navigation app on my mobile phone, e.g. Google Maps, Waze
- Notices on lamp posts
- Official notice in local paper
- Official notice in the London Gazette
- Reports in local newspapers
- Sat nav
- Signs at roadside
- Social media
- Traffic reports on local radio
- Traffic websites e.g. AA, RAC, Traffic Wales
- Word of mouth

Other (Please write in) _____

None of these – don't want to be informed of changes to the road network
(Single code)

PART II – 20 mph

Q1. Do you have any concerns about roads and road safety and getting about where you live?

- Yes – ASK Q2
- No – GO TO Q3

IF HAVE ANY CONCERNS

Q2. What concerns do you have? Anything else? Write in

ASK ALL

Q3. How concerned would you say you are, if at all, about the following issues where you live? (Very concerned / fairly concerned / not very concerned / not at all concerned / don't know)

- i) Cars or other vehicles driving too fast generally
- ii) Cars or other vehicles driving too fast near schools
- iii) Cars or other vehicles parked on pavements
- iv) Roads not safe for cyclists
- v) Not enough cycle lanes

- vi) Difficult to cross the road safely
- vii) Poor air quality / vehicle emissions
- viii) Difficult to find somewhere to park near my house

Q4. How safe do you feel when doing the following where you live? (Very safe / fairly safe / not very safe / not at all safe/ don't know / not applicable)
Randomise order

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

Q5. What is the speed limit on your street? *Write in*

Q6. Do you feel that this is the right speed limit for your street?

- Yes - Go to Q9
- No - Ask Q7
- Don't know - Go to Q9

IF NO

Q7. What would you like the speed limit to be on your street? *Write in*

Q8. Would you like to see this speed limit applied throughout the area in which you live? *Write in*

- Yes
- No

ASK ALL

Q9. Would you support a speed limit of 20mph in the area in which you live?

- Yes
- No
- Don't know

Q10. The Welsh Government is planning to reduce the speed limit from 30 mph to 20 mph in residential communities across Wales. What's your view on this idea?

- Strongly in favour - Ask Q11
- Slightly in favour - Ask Q11

Slightly against - Ask Q12

Strongly against - Ask Q12

Don't know - Go to Q13

IF IN FAVOUR AT Q10

Q11. Why are you in favour of reducing the speed limit to 20mph? Anything else? Write in

IF AGAINST AT Q10

Q12. Why are you against reducing the speed limit to 20mph? Anything else? Write in

ASK ALL

Q13. Here are some reasons people might support 20mph speed limits. Which of these do you agree with? Tick all that apply

Encourages more walking and cycling
 Improves the quality of life
 Improves traffic flow
 Makes it safer for cyclists
 Makes it safer for pedestrians
 Makes streets more pleasant to live in
 Means children can play more safely
 Means fewer serious accidents on the roads
 Reduces noise
 Reduces pollution

None of these

Don't know

ASK ALL

Q14. Here are some reasons people might oppose 20mph speed limits. Which of these do you agree with? Code all mentioned

Increases accidents
 Increases congestion
 Increases pollution
 Makes journey times longer
 Makes the quality of life worse
 Might be ignored by many drivers
 Might not be policed and enforced effectively
 Would annoy drivers
 Would make no difference to cyclists' safety
 Would make no difference to pedestrians' safety

None of these
Don't know

Q15. Can you tell me what difference 20mph speed limits might make to you personally – would they make you more or less likely to do the following...? (Much more likely / a little more likely / no difference / a little less likely / much less likely / don't know / not applicable)

Order to be randomised

- i) Walk more
- ii) Drive more
- iii) Cycle more

Q16. Have you seen or heard any marketing, communications or advertising recently about legislation to reduce the speed limit to 20mph in Wales?

Yes
No

Q17. Can you tell me to what extent you'd agree or disagree with the following statements? Please tell me if you strongly agree, agree, neither agree nor disagree, disagree or strongly disagree that... *Order to be randomised*

- i) If 20mph limits were introduced most drivers would not stick to them
- ii) Cars parked on pavements are a real problem for pushchairs and wheelchairs
- iii) It is just too difficult to stay at 20mph
- iv) I wish everyone would slow down a bit on the roads
- v) 20mph limits are an example of the nanny state
- vi) Streets would be a lot nicer for pedestrians with a 20mph speed limit
- vii) There needs to be proper enforcement by the police for 20mph limits to work
- viii) People's driving habits would change if 20mph limits were introduced

Q18. Which, if any, of the following do you personally drive? *Tick all that apply*

A coach/bus
A commercial van
A company car
A lorry
A motorbike
A private car for commuting
A private car for personal use
A taxi
None of these

FOR UP TO 3 MENTIONED ABOVE ASK**Q19. How often do you drive [vehicle name from Q18]?**

- Every day
- Most days
- 2-3 days a week
- 2-3 times a month
- About once a month
- Every 2-3 months
- Less often
- Not at all

ASK ALL**Q20. How often, if at all, do you do the following? (Scale as Q19 above plus Never) Randomise order**

- i) Walk for local journeys (that take up to 20 minutes)
- ii) Cycle for local journeys (that take up to 20 minutes)
- iii) Use public transport

Plus standard profile questions: age, gender, socioeconomic grade, Welsh region, whether speak Welsh (included in costs)

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

Plus additional media consumption question below:**Q. About how often do you do each of these things?**

(At least once a day / At least once a week / Less often / Never)

- 01: Read a national (UK) newspaper
- 02: Read a national (Wales) newspaper
- 03: Read a local newspaper
- 04: Listen to a BBC radio station
- 05: Listen to a commercial radio station
- 06: Watch BBC TV
- 07: Watch commercial TV
- 08: Use the internet
- 09: Use Facebook
- 10: Use Twitter
- 11: Use Instagram
- 12: Use Snapchat
- 13: Use Youtube
- 14: Use an app on my smartphone