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CONTENTS

	Page
1.0 INTRODUCTION	4
2.0 METHODOLOGY	4
3.0 RESPONDENTS	4
4.0 RESULTS:	7
4.1 How satisfied are you with the following facilities in Cardiff?	7
4.2 How do you travel to or from the following activities?	11
4.3 If currently in employment, how often do you travel by the following types of transport when commuting to or from work?	14
4.4 How satisfied or dissatisfied are you with each of the following elements of your local bus services, whether you normally use them or not?	15
4.5 How satisfied or dissatisfied are you with each of the following elements of cycling facilities, whether you normally use them or not?	15
4.6 How safe do you feel cycling and walking in Cardiff?	16
4.7 How serious do you think travel and transport problems are in Cardiff?	19
4.8 What improvements would you like to see to transport in Cardiff, and what do you think Cardiff's priorities for future investment should be?	21
5.0 RESPONDENT PROFILE:	23
5.1 Car ownership	23
5.2 Age	23
5.3 Gender	24
5.4 Children in households	24
5.5 Working status	24
5.6 Housing tenure	25
5.7 Disability	25
5.8 Medical conditions	25
5.9 Religion	26
5.10 Sexual orientation	26
5.11 Marital status	27
5.12 Ethnicity	27

TRANSPORT SURVEY 2017

1.0 INTRODUCTION

Cardiff Council is seeking to achieve a step-change in how people commute into, and travel around the city and prioritise sustainable travel modes. Responses to this survey will inform the transport improvement priorities in Cardiff and help the city manage growth effectively.

2.0 METHODOLOGY

This year is the first time that the Transport Survey has been a standalone survey. Prior to this, it formed part of Cardiff Council's Ask Cardiff Survey, which, in contrast, covers a wide range of topics. In previous years, paper versions of the Ask Cardiff Survey were also sent to a sample of several thousand Cardiff residents. However, this ceased in 2017 with the survey essentially becoming online only. These methodological changes may have resulted in a change to the profile/characteristics of respondents for 2017 compared with previous years.

The internet-based survey was available to complete online from 7th August to 29th September 2017. The introduction to the online questionnaire stated that a paper copy was available on demand although no requests of this kind were received.

An initial email inviting people to complete the survey was sent to 84,868 addresses on Cardiff Council databases, and it was advertised via a banner on the Cardiff Council website and on the Council's internal computer system Digigov. It was also regularly promoted during the consultation period through social media via @cardiffcouncil, @cardiffdebate and using #KeepCardiffMoving – Facebook had a reach of 11,000 and Twitter 503.2k with the campaign receiving 65 Retweets/Shares and 21 Likes. In addition, the survey was picked up and promoted by Sustrans, a charity who work to make it easier for people to walk and cycle.

3.0 RESPONDENTS

In total, 4,802 valid responses were received, although some of these were only partially completed. 103 of the surveys were completed using the Welsh language version.

The Table overleaf shows a breakdown of the place of residence of respondents. Almost nine-tenths (88.7%) live in Cardiff, although the Cardiff East and City & Cardiff South Neighbourhood Partnership Areas only accounted for 251 and 370 respondents respectively. Outside of Cardiff, the Vale of Glamorgan (219 respondents) was the most common location, followed by Rhondda Cynon Taff (78) and Caerphilly (51).

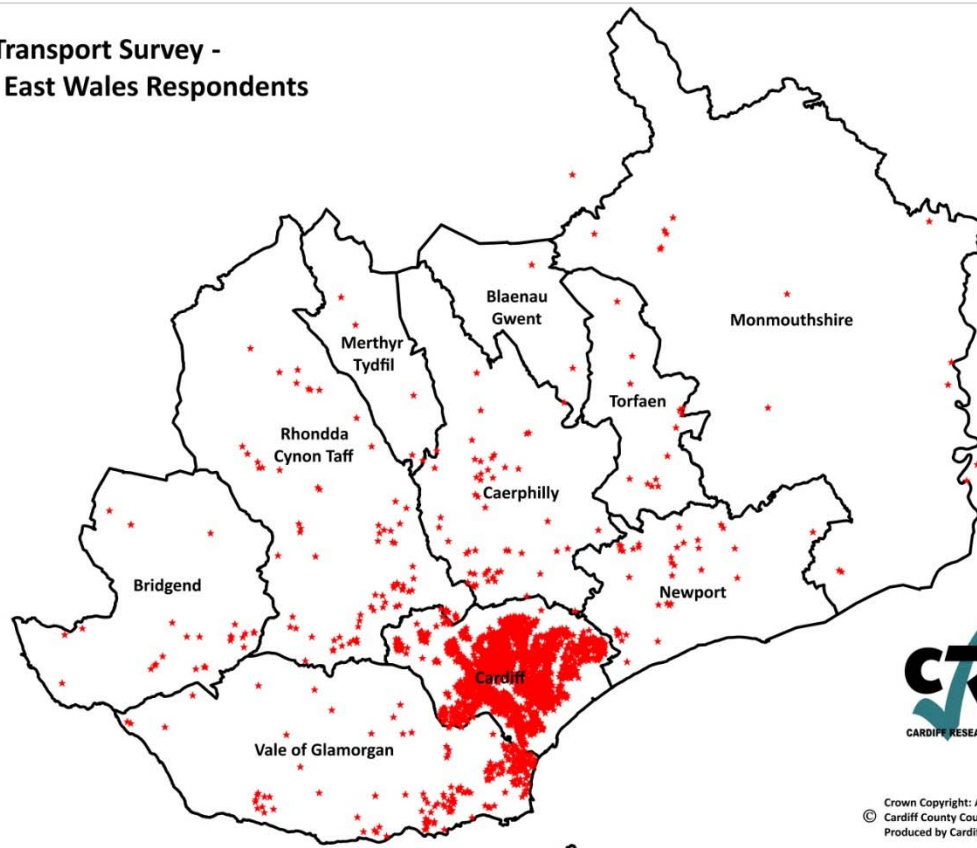
The place of residence of respondents (who provided a valid postcode) from across SE Wales and within Cardiff can be seen in the maps on page 3:

Place of Residence of Respondents		
Place of residence	No.	%
Cardiff	4,260	88.7
Cardiff East	251	5.2
Cardiff North	1,390	28.9
Cardiff South East	616	12.8
Cardiff South West	611	12.7
Cardiff West	994	20.7
City & Cardiff South	370	7.7
Unknown NPA (Cathays)	28	0.6
Outside of Cardiff	541	11.3
Elsewhere in Wales	491	10.2
Blaenau Gwent	3	0.1
Bridgend	24	0.5
Caerphilly	51	1.1
Carmarthenshire	4	0.1
Merthyr Tydfil	6	0.1
Monmouthshire	14	0.3
Newport	37	0.8
Pembrokeshire	1	0.0
Powys	2	0.0
Rhondda Cynon Taff	78	1.6
Swansea	5	0.1
Torfaen	15	0.3
Vale of Glamorgan	219	4.6
Wrexham	1	0.0
Unknown (Wales)	31	0.6
England	11	0.2
Dudley	1	0.0
Forest of Dean	3	0.1
Kingston upon Thames	1	0.0
Poole	1	0.0
Reading	1	0.0
South Gloucestershire	1	0.0
Southwark	1	0.0
Unknown (England)	2	0.0
Unknown (Outside Cardiff)	39	0.8
Unknown	1	0.0
Total	4,802	100.0

NB. Location has been based on postcode (or the response to the 'ward of residence' question if the postcode was not valid).

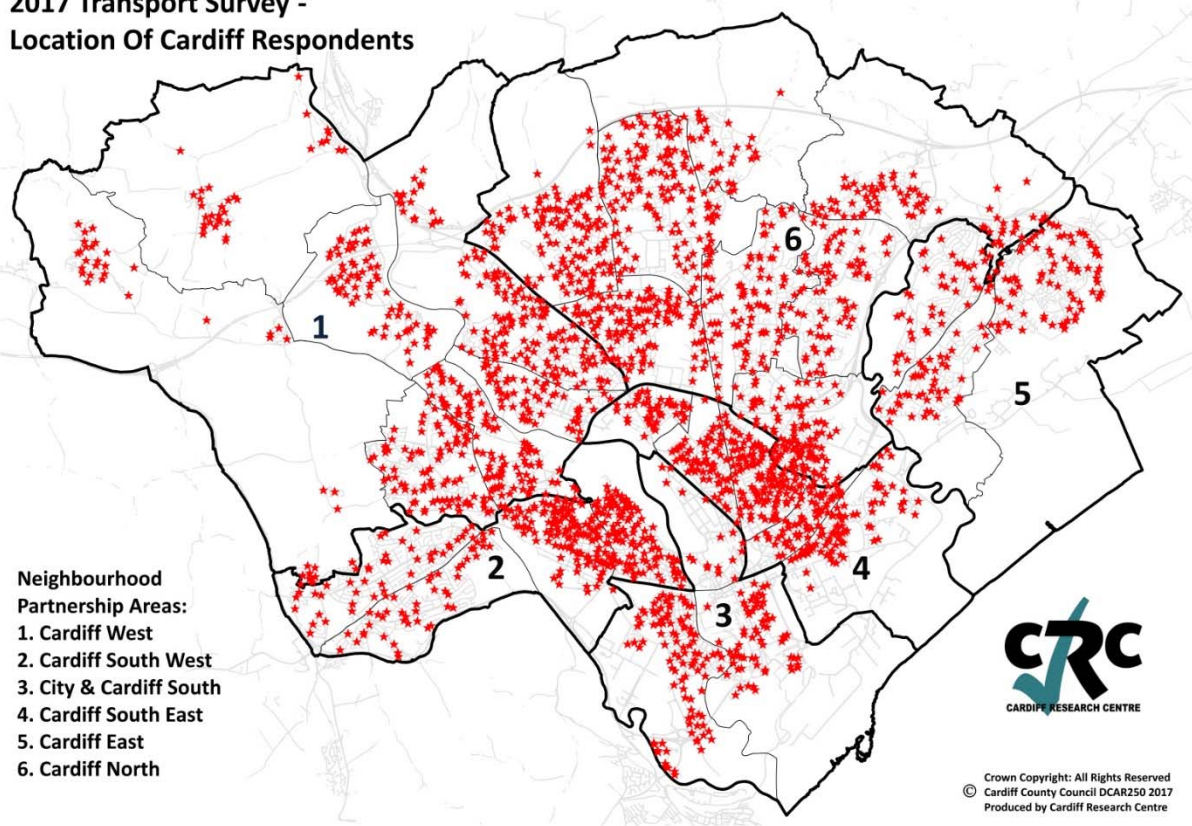
Respondents from Cardiff categorised as 'Unknown NPA (Cathays)' are those that indicated they lived in Cathays but did not provide a valid postcode. Therefore, it is not possible to determine whether they reside in Cardiff South East or City & Cardiff South.

**2017 Transport Survey -
South East Wales Respondents**



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**2017 Transport Survey -
Location Of Cardiff Respondents**



- Neighbourhood Partnership Areas:**
- 1. Cardiff West
 - 2. Cardiff South West
 - 3. City & Cardiff South
 - 4. Cardiff South East
 - 5. Cardiff East
 - 6. Cardiff North



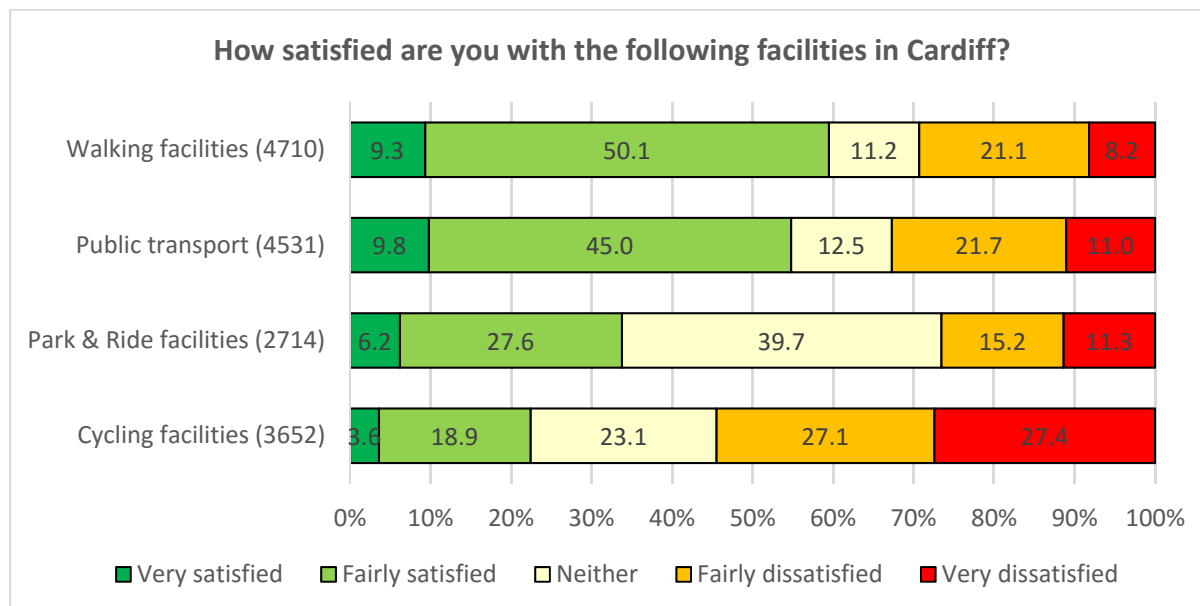
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4.0 RESULTS

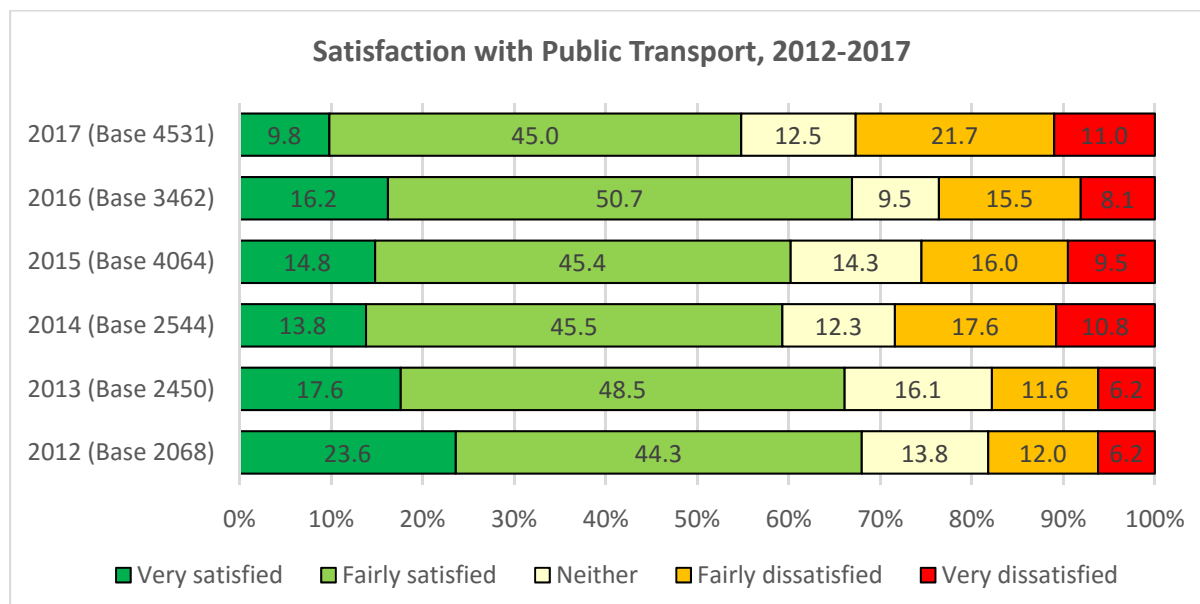
[NB. These results are unweighted and reflect the observed numbers and percentages]

4.1 How satisfied are you with the following facilities in Cardiff?

Around three-fifths (59.5%) of respondents were satisfied with Walking Facilities in Cardiff, while over half (54.8%) expressed satisfaction with Public Transport. In contrast, more than half of respondents (54.5%) were dissatisfied with Cycling Facilities including over a quarter (27.4%) that were very dissatisfied.



Base sizes shown in brackets. Excludes 'Don't Know' responses.

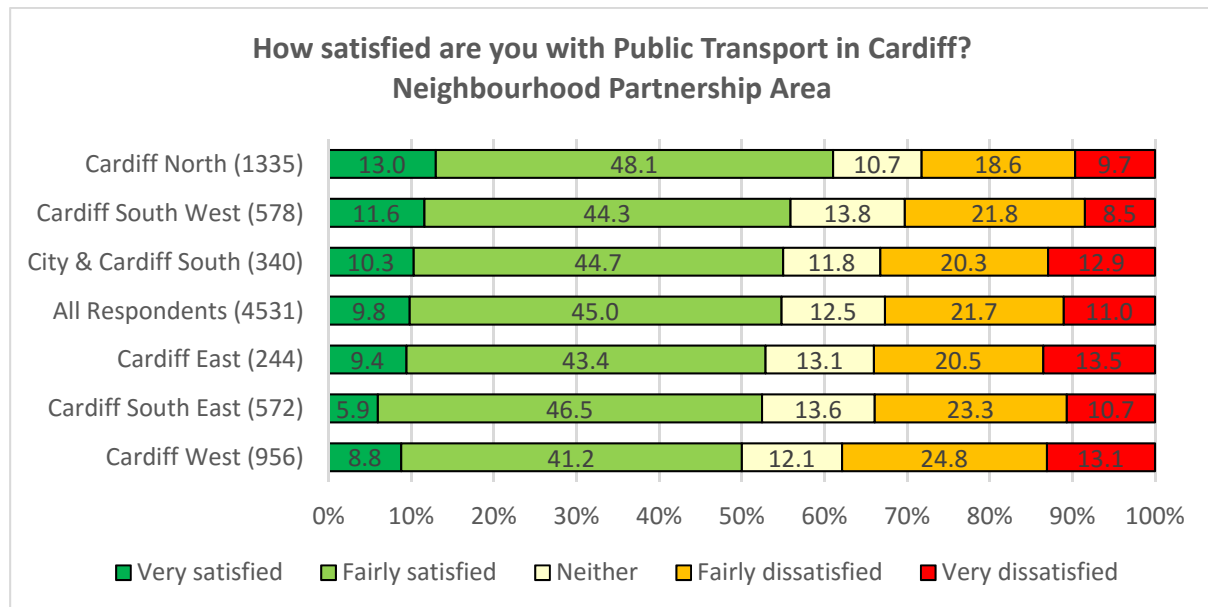


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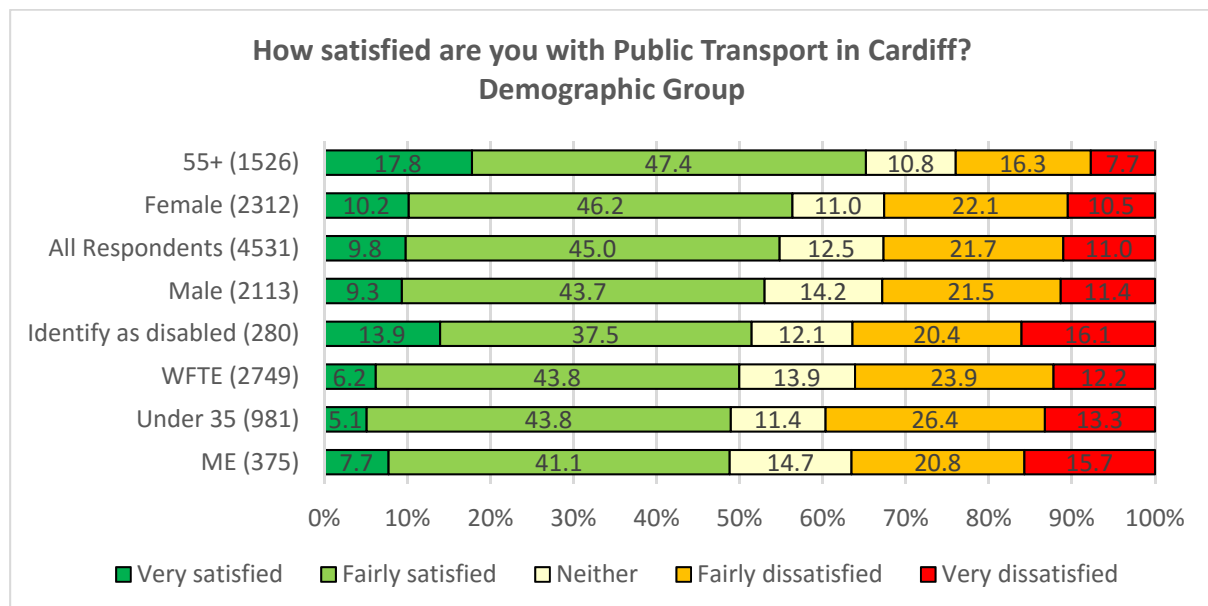
NB. There are methodological differences in 2017 compared with previous years. From 2012 to 2016, the Transport Survey was not a standalone survey and instead formed part of Cardiff Council's Ask Cardiff Survey, which covers a wide range of topics.

The chart above looks at satisfaction with Public Transport between 2012 and 2017. This shows that, during this period, satisfaction levels were at their lowest in 2017 and had fallen significantly on the previous year.

When analysed by neighbourhood partnership area (NPA), it can be seen that satisfaction with Public Transport was highest in Cardiff North (61.0%), compared with just 50.0% in Cardiff West. In terms of the demographic groups, almost two-thirds of those aged 55+ (65.2%) were satisfied with Public Transport compared with 48.8% of minority ethnic respondents and 48.9% of those aged under 35.

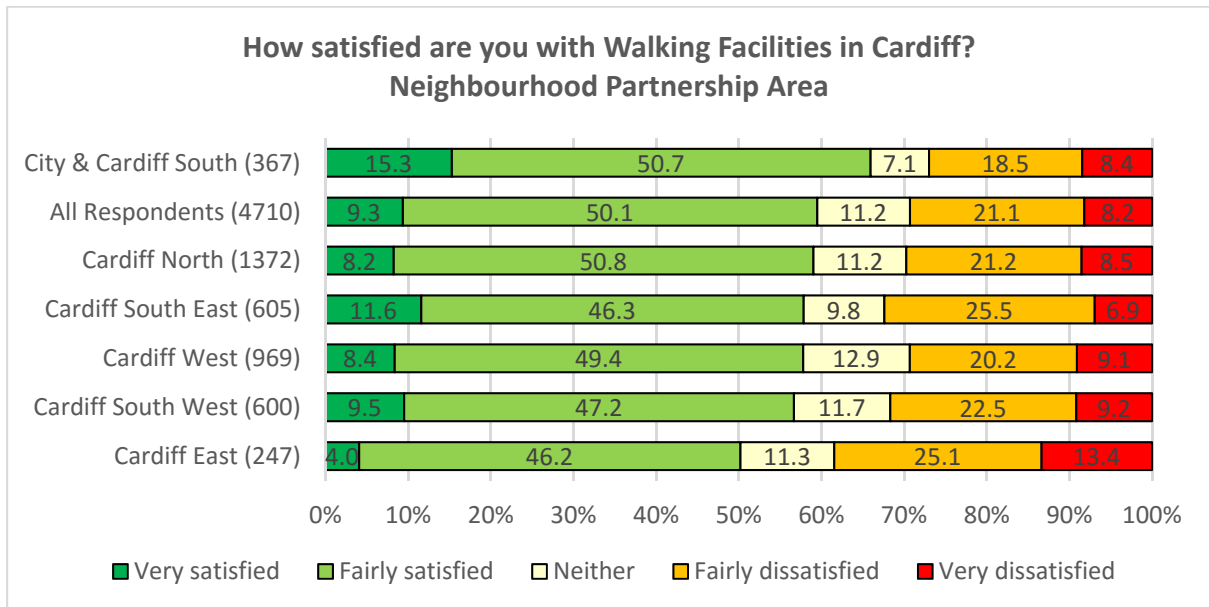


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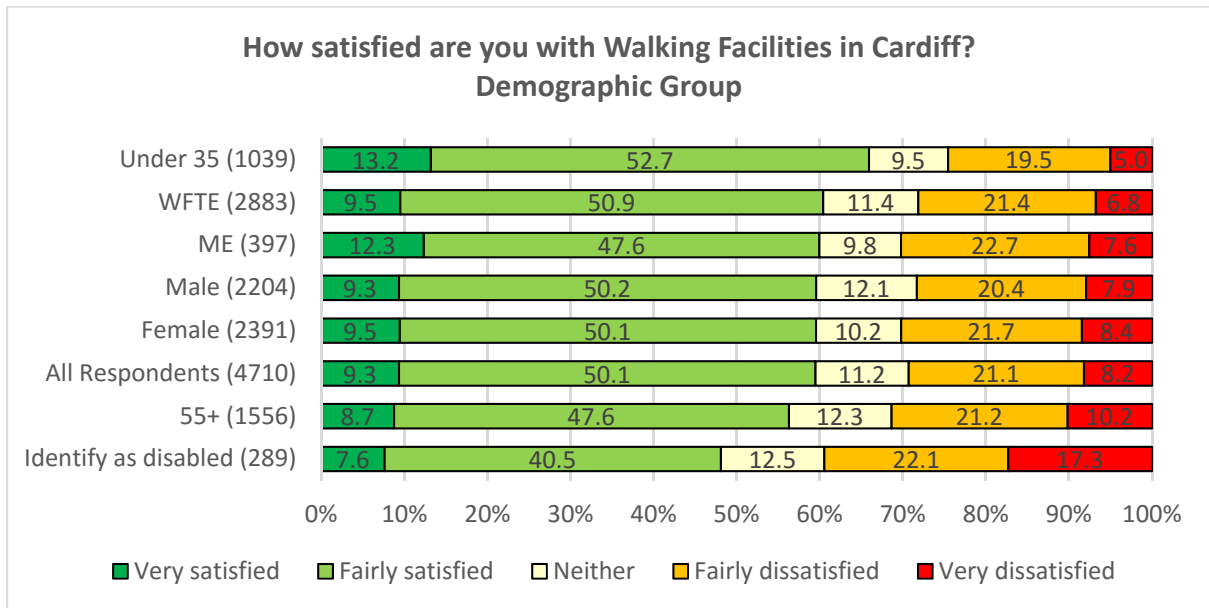


Base sizes shown in brackets. Excludes 'Don't Know' responses.

Satisfaction with Walking Facilities was greatest in City & Cardiff South (65.9%) and for under 35s (65.9%). In contrast, it was lowest in Cardiff East (50.2%) and for those identifying themselves as disabled (48.1%).



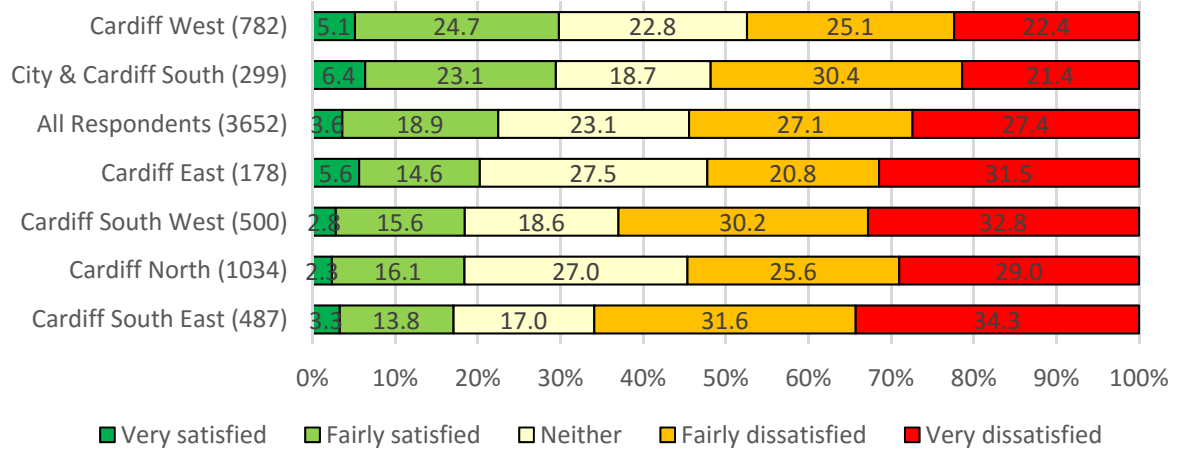
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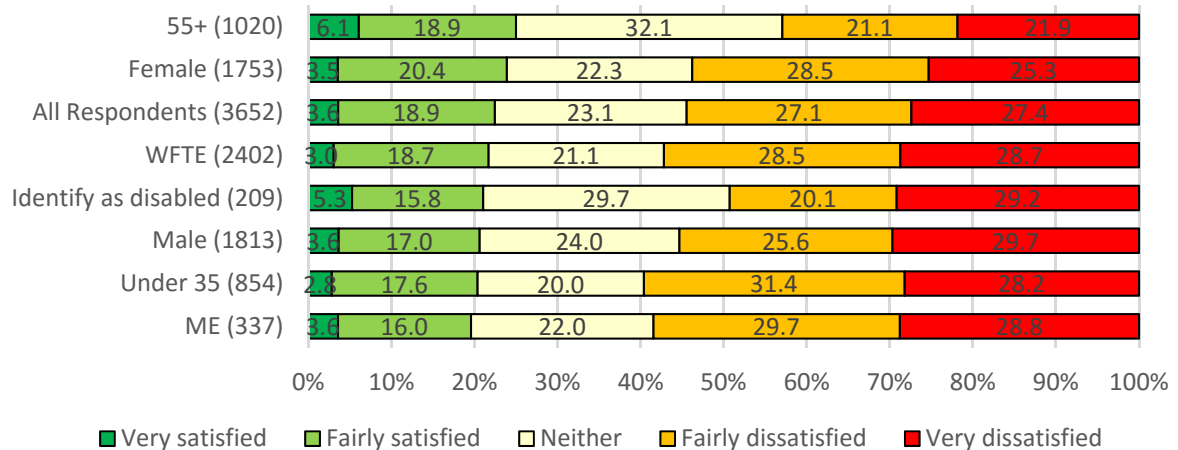
Satisfaction with Cycling Facilities in Cardiff was low across each of the NPAs and demographic groups, with highs of just 29.8% in Cardiff West and 25.0% for those aged 55+ respectively. In contrast, almost two-thirds of respondents from Cardiff South East (65.9%) and Cardiff South West (63.0%) and around three-fifths of under 35s (59.6%) displayed dissatisfaction with these facilities.

How satisfied are you with Cycling Facilities in Cardiff? Neighbourhood Partnership Area



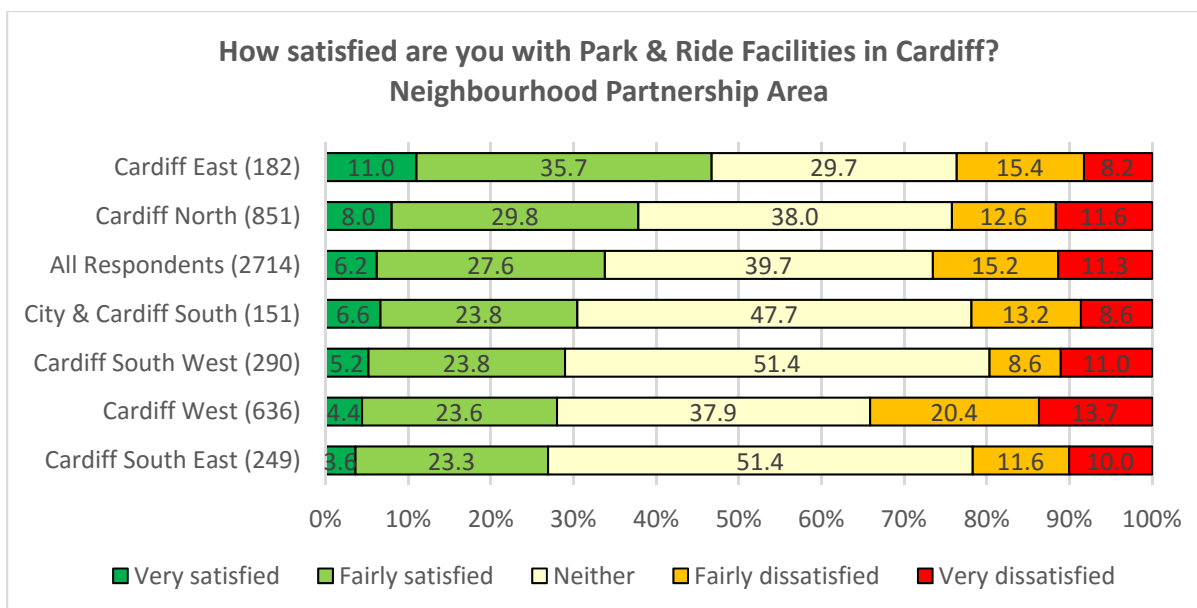
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How satisfied are you with Cycling Facilities in Cardiff? Demographic Group

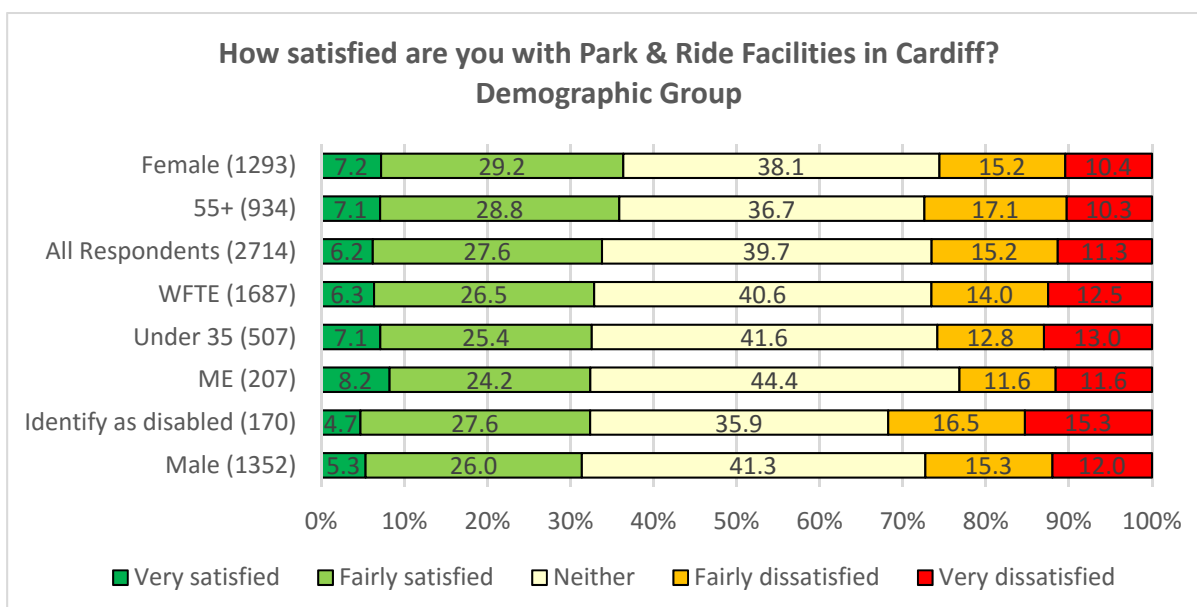


Base sizes shown in brackets. Excludes 'Don't Know' responses.

Cardiff East respondents (46.7%) were most likely to be satisfied with Park & Ride Facilities in Cardiff, compared with just 26.9% in Cardiff South East. However, Cardiff West (34.1%) had the highest proportion of respondents that were dissatisfied to some extent. Satisfaction with these facilities was very similar across the demographic groups although dissatisfaction was highest for those identifying themselves as disabled (31.8%).



Base sizes shown in brackets. Excludes 'Don't Know' responses.



Base sizes shown in brackets. Excludes 'Don't Know' responses.

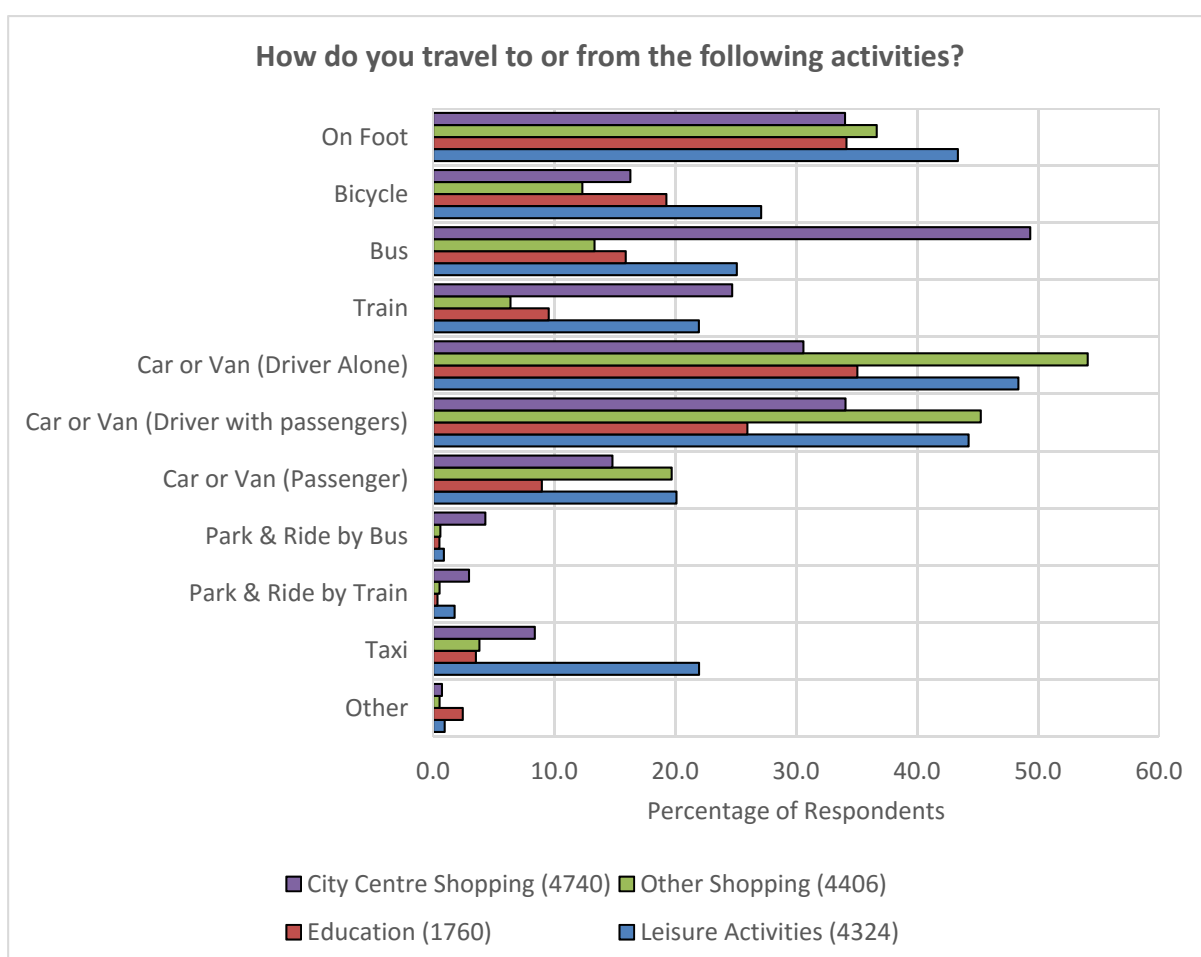
4.2 How do you travel to or from the following activities?

Car or van (driver alone) is the most popular mode of transport for respondents travelling for Other Shopping (54.1%), Education (35.1%) and Leisure Activities (48.4%). However, for City Centre Shopping, bus (49.3%) is the most common form of transport with almost half of respondents using this method. In fact, all modes of public transport are most likely to be used when shopping in the city centre.

Over a third of respondents travel on foot for each of the activities although it is most popular for Leisure Activities (43.4%). Bicycles (27.1%), a passenger in a car or van (20.1%) and taxis (22.0%) also have their highest rates of use for this activity.

Mode of transport	City Centre Shopping		Other Shopping		Education		Leisure Activities	
	No.	%	No.	%	No.	%	No.	%
On Foot	1,613	34.0	1,615	36.7	601	34.1	1,875	43.4
Bicycle	772	16.3	543	12.3	339	19.3	1,172	27.1
Bus	2,339	49.3	587	13.3	280	15.9	1,085	25.1
Train	1,171	24.7	281	6.4	168	9.5	949	21.9
Car or Van (Driver Alone)	1,450	30.6	2,383	54.1	617	35.1	2,091	48.4
Car or Van (Driver with passengers)	1,615	34.1	1,994	45.3	457	26.0	1,913	44.2
Car or Van (Passenger)	702	14.8	868	19.7	158	9.0	869	20.1
Park & Ride by Bus	204	4.3	26	0.6	9	0.5	38	0.9
Park & Ride by Train	140	3.0	23	0.5	6	0.3	76	1.8
Taxi	398	8.4	168	3.8	62	3.5	950	22.0
Other	34	0.7	23	0.5	43	2.4	41	0.9
Total Respondents	4,740	-	4,406	-	1,760	-	4,324	-

NB. Percentages do not sum to 100.0% because respondents could give multiple answers



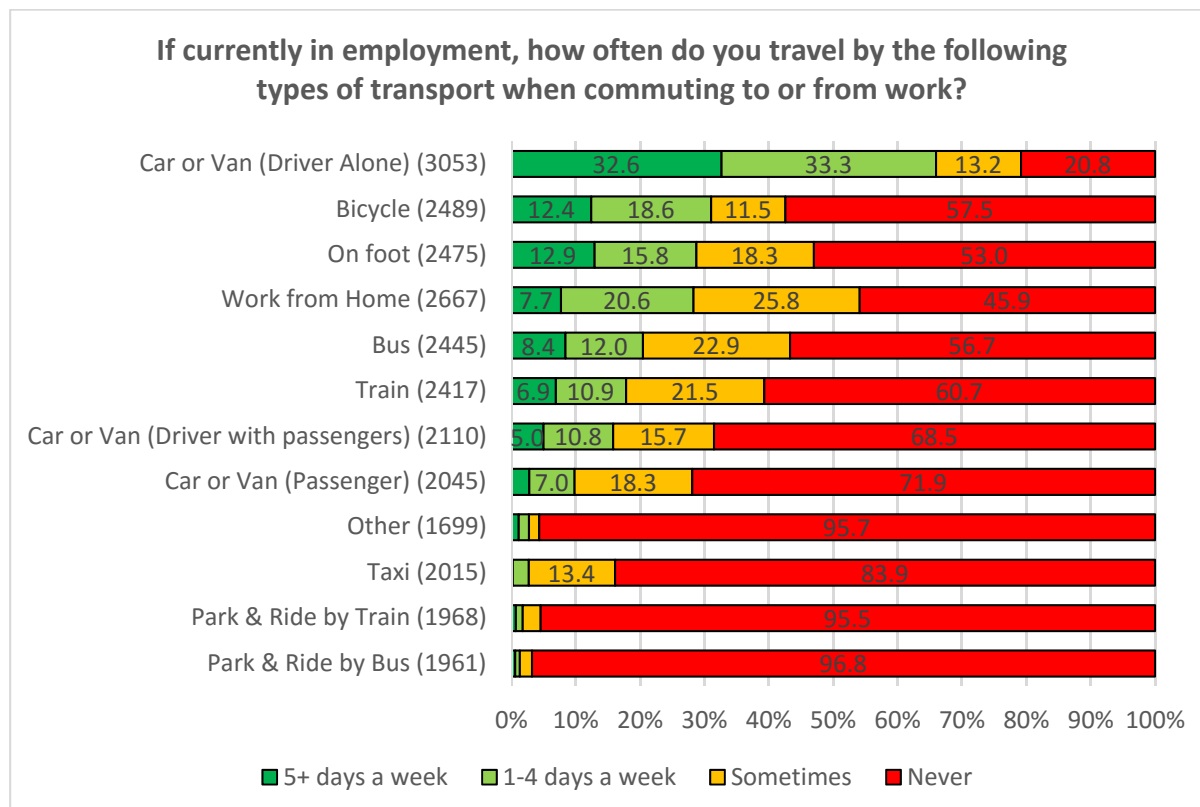
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78 respondents selected 'Other' and gave further information with 37.2% stating that they are not involved in some or all of the activities. Meanwhile, almost a fifth travelled by motorbike/scooter (19.2%) and 9.0% used a mobility scooter.

Theme	No.	%
Not involved in activity	29	37.2
Motorbike/scooter	15	19.2
Mobility scooter	7	9.0
Plane	2	2.6
Uber	2	2.6
Boat/water taxi	2	2.6
Miscellaneous	21	26.9
Total Respondents	78	100.0

4.3 If currently in employment, how often do you travel by the following types of transport when commuting to or from work?

Two-thirds of respondents (66.0%) indicated that they commuted to work at least once a week by car or van (driver alone); more than double the next highest figure of 31.0% for bicycles. Of those using a car or van (driver alone) at least once a week, almost half (49.5%) used it five times a week.



Base sizes shown in brackets.

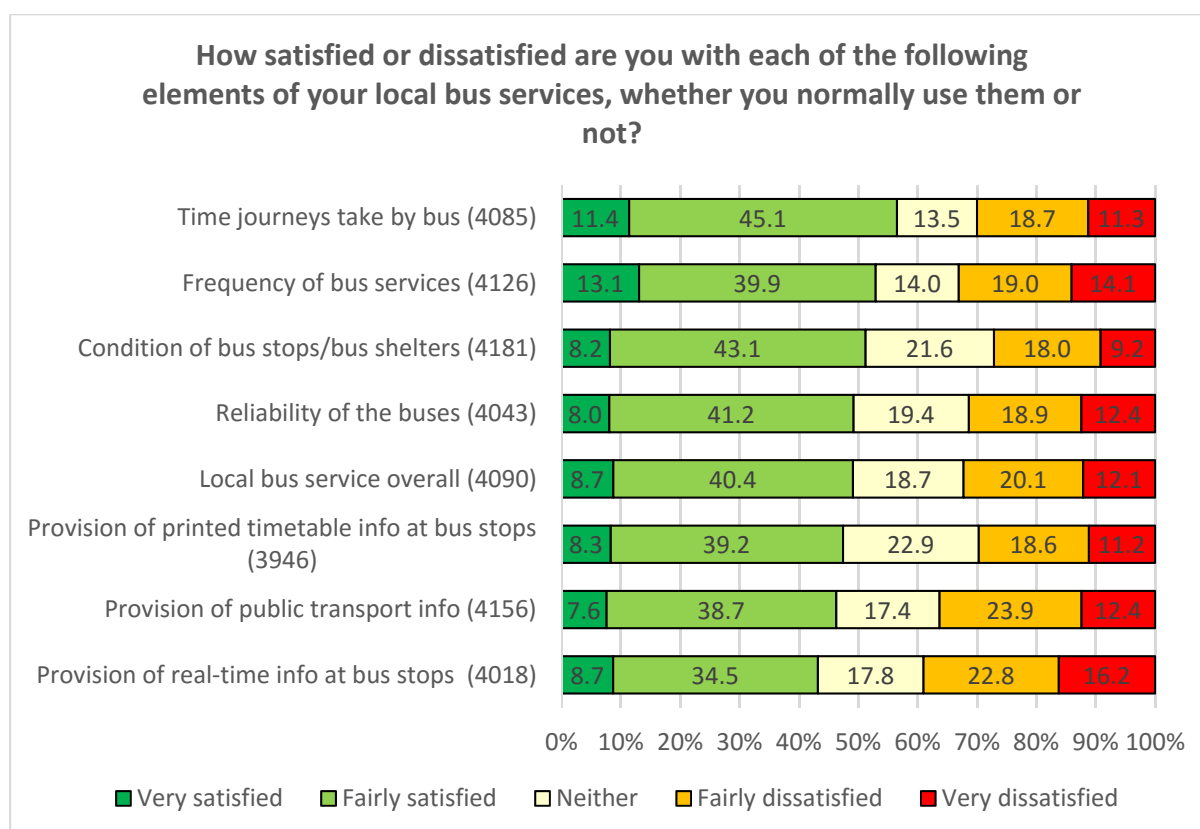
Of the 58 respondents that specified another method of transport, over two-fifths (43.1%) used a motorbike/moped.

Theme	No.	%
Motorbike/moped	25	43.1
Scooter	5	8.6
Not in employment	4	6.9
Lift from friend	4	6.9
Mobility scooter	3	5.2
Run	2	3.4
Plane	2	3.4
Miscellaneous	13	22.4
Total Respondents	58	100.0

4.4 How satisfied or dissatisfied are you with each of the following elements of your local bus services, whether you normally use them or not?

More than half of respondents stated that they were satisfied with the time journeys take by bus (56.5%), the frequency of bus services (52.9%) and the condition of bus stops/shelters (51.2%).

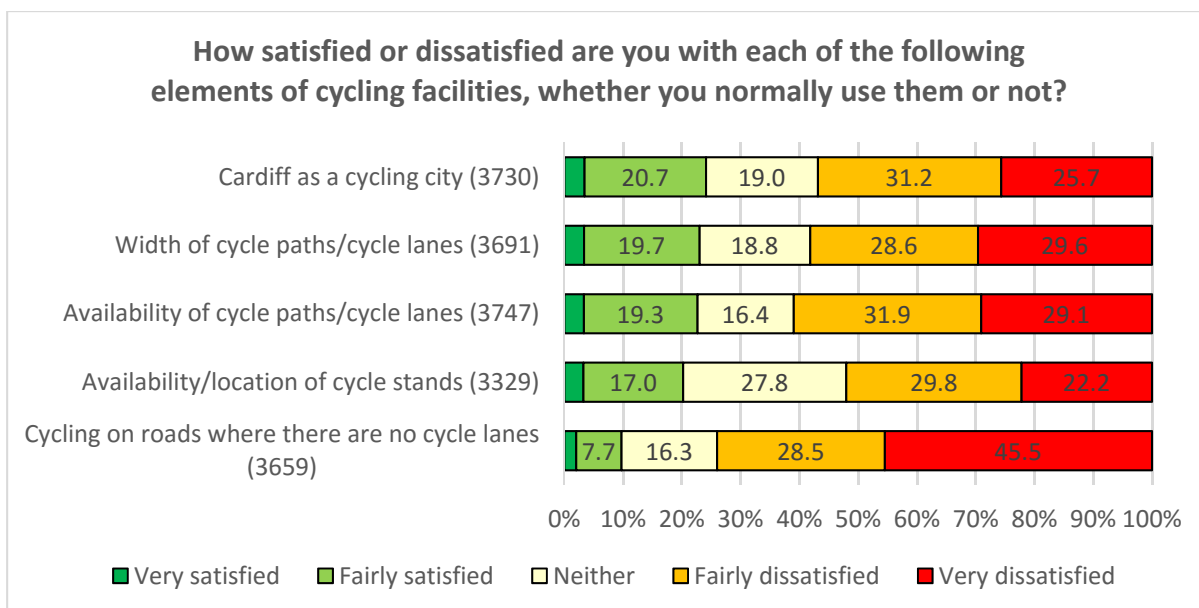
In contrast, over a third were dissatisfied with the provision of real-time information at bus stops (39.0%) and the provision of public transport information (36.3%). In fact, over a quarter of respondents were dissatisfied to some extent with each of the specified elements of the local bus service.



Base sizes shown in brackets. Excludes 'Don't Know' responses.

4.5 How satisfied or dissatisfied are you with each of the following elements of cycling facilities, whether you normally use them or not?

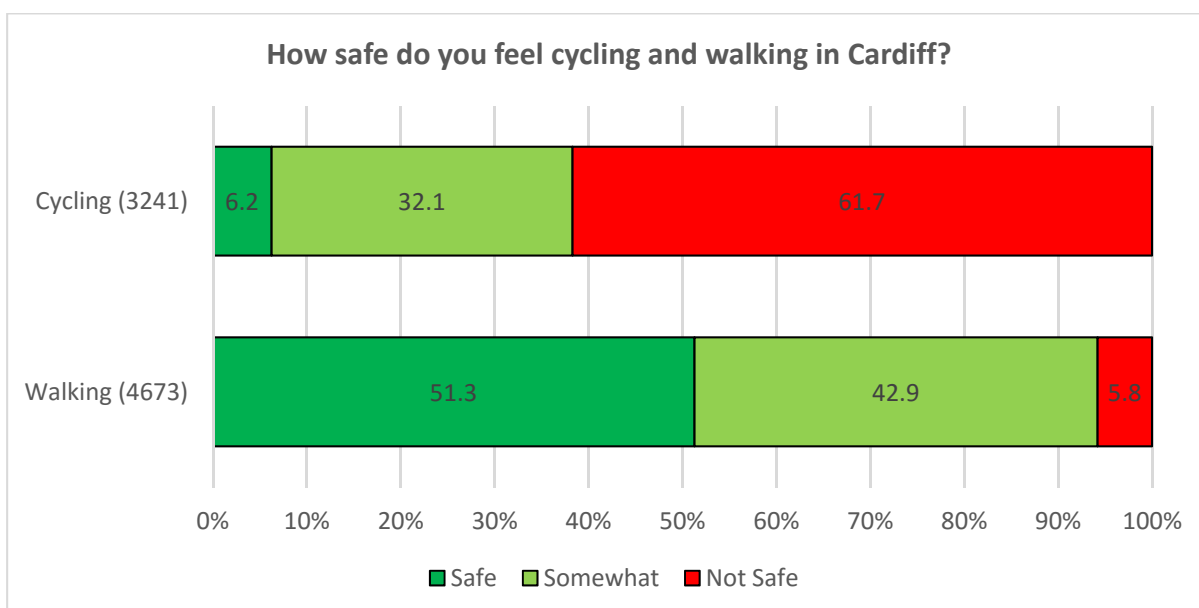
More than half of respondents highlighted dissatisfaction with each of the specified elements of cycling facilities. This was highest for cycling on roads where there are no cycle lanes where almost three-quarters (74.0%) of respondents expressed dissatisfaction, including 45.5% that were very dissatisfied.



Base sizes shown in brackets. Excludes 'Don't Know' responses.

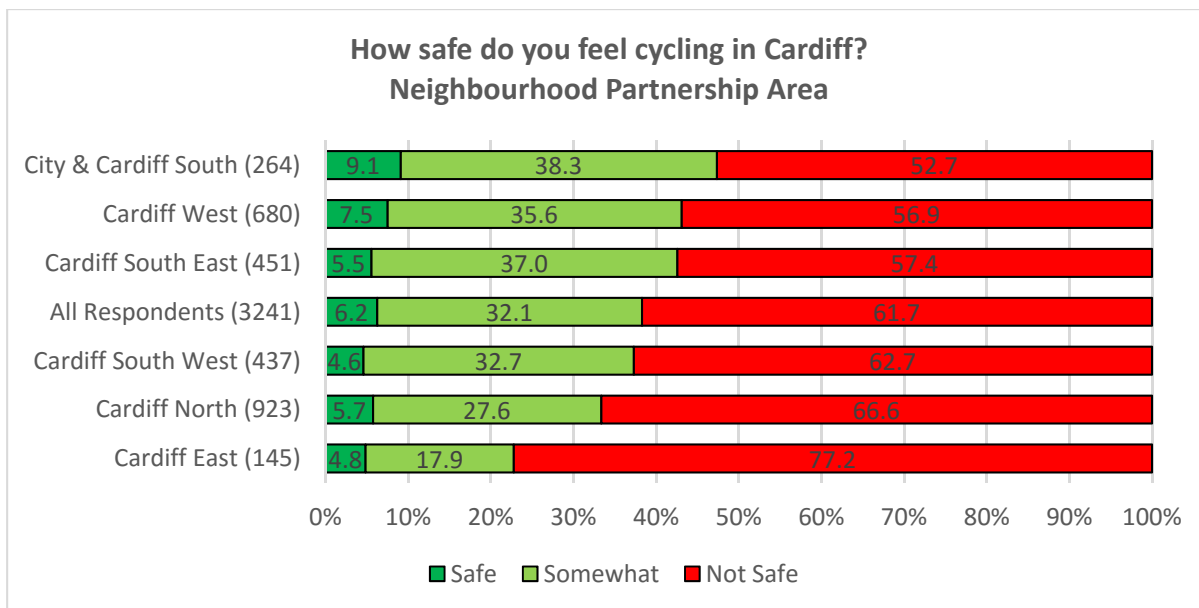
4.6 How safe do you feel cycling and walking in Cardiff?

Over nine-tenths (94.2%) of respondents said that they felt safe when walking in Cardiff. However, in contrast, more than three-fifths (61.7%) felt unsafe when cycling in the city.

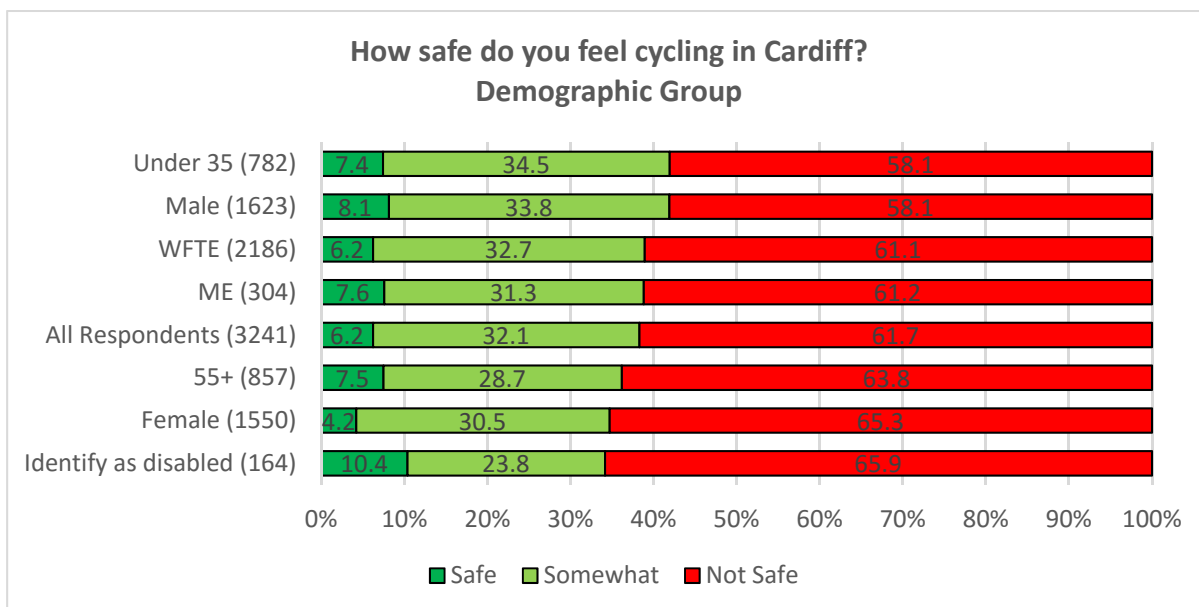


Base sizes shown in brackets. Excludes 'Don't Know' responses.

More than half of respondents in each of the NPAs felt unsafe when cycling, although this was highest in Cardiff East (77.2%). This figure also exceeded 50% for each of the demographic groups with those identifying themselves as disabled (65.9%) most likely to feel unsafe.

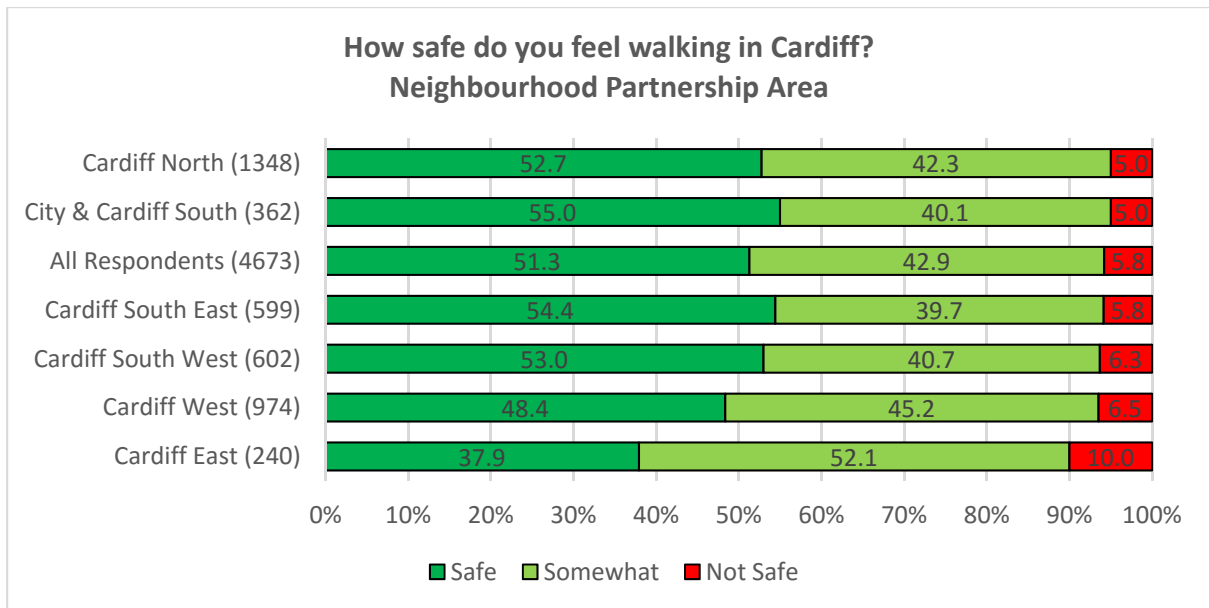


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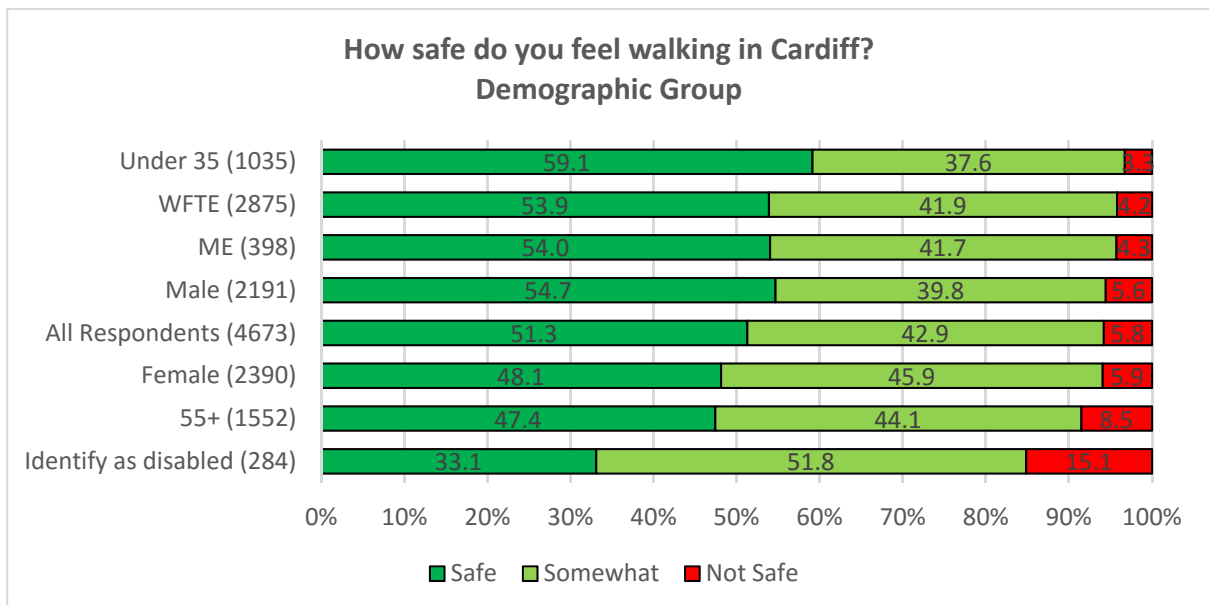


Base sizes shown in brackets. Excludes 'Don't Know' responses.

Respondents from Cardiff South East and those identifying themselves as disabled were also most likely to feel unsafe when walking, although these figures were much lower at 10.0% and 15.1% respectively.



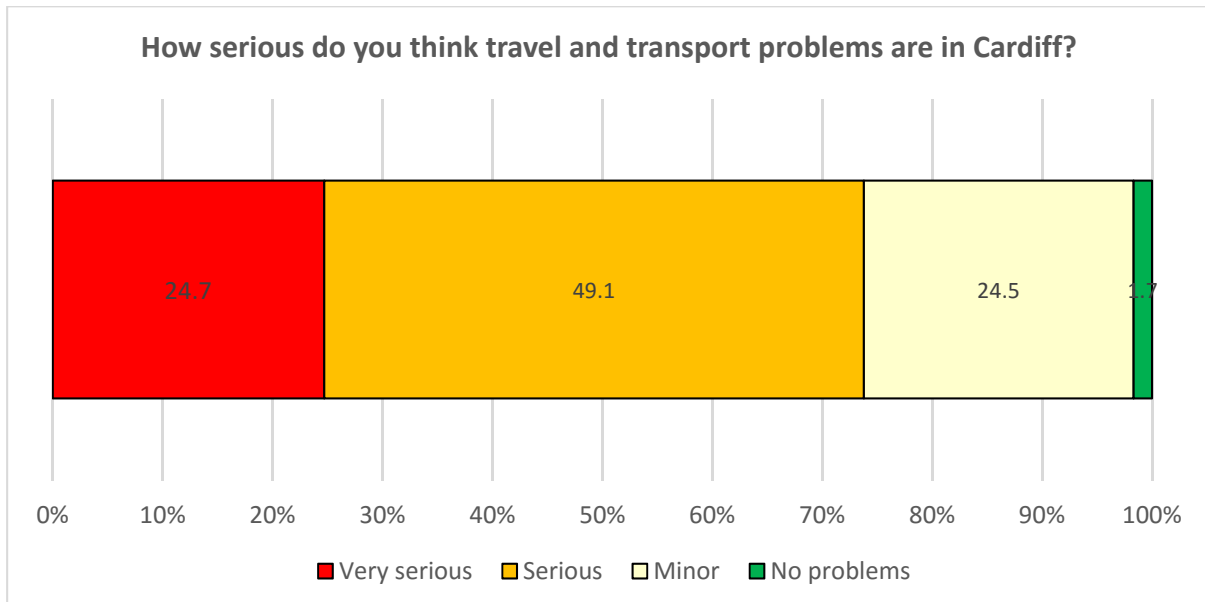
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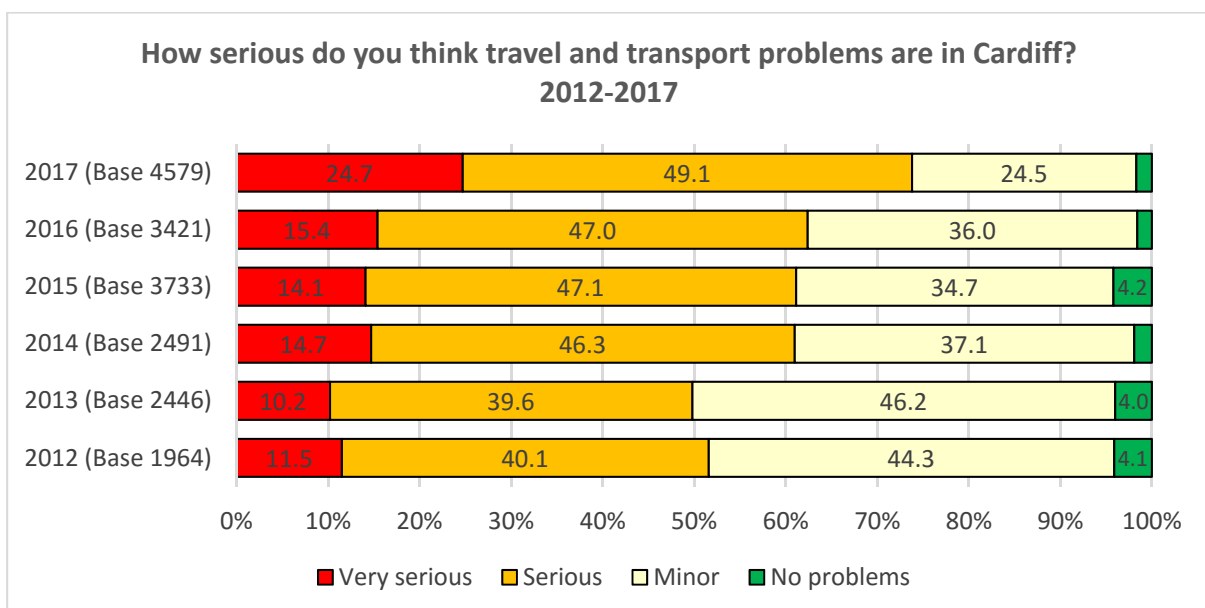
4.7 How serious do you think travel and transport problems are in Cardiff?

Almost three-quarters (73.8%) of respondents deemed travel and transport problems in Cardiff to be either serious (49.1%) or very serious (24.7%). In contrast, just 1.7% felt there were no problems.



Base sizes shown in brackets. Excludes 'Don't Know' responses.

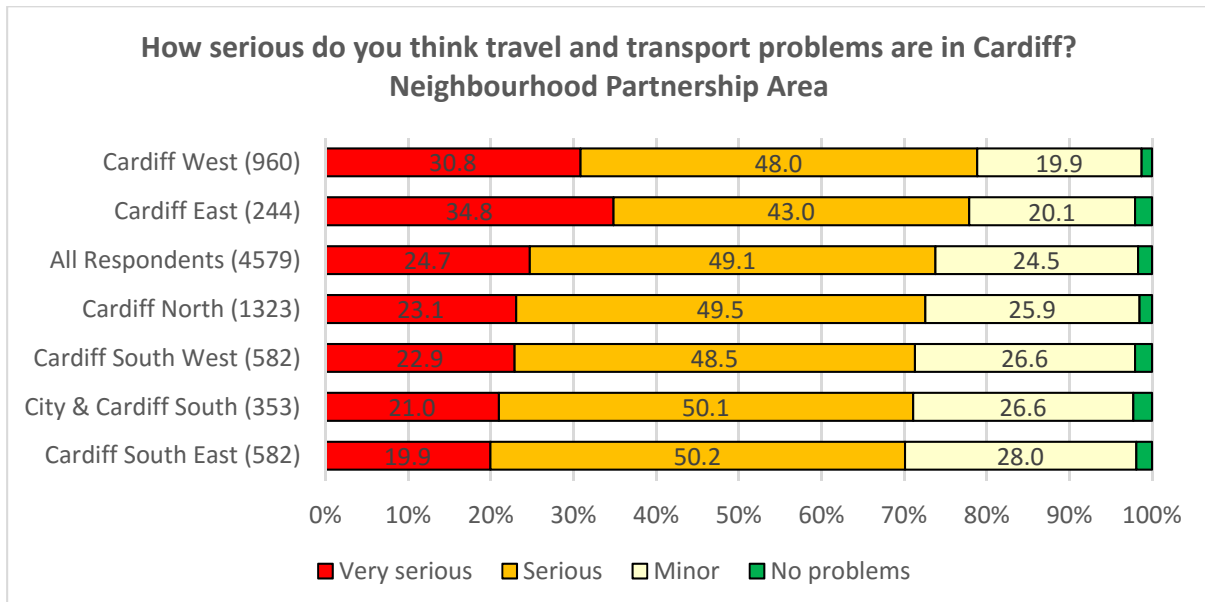
The chart below, which looks at the severity of travel and transport problems in Cardiff between 2012 and 2017, shows that respondents in 2017 found the issues to be more serious than in previous years. In 2012 and 2013, around half of respondents deemed the problems to be serious or very serious but by 2017 this had increased to nearly three-quarters, including a quarter that found them to be very serious.



Base sizes shown in brackets. Excludes 'Don't Know' responses.

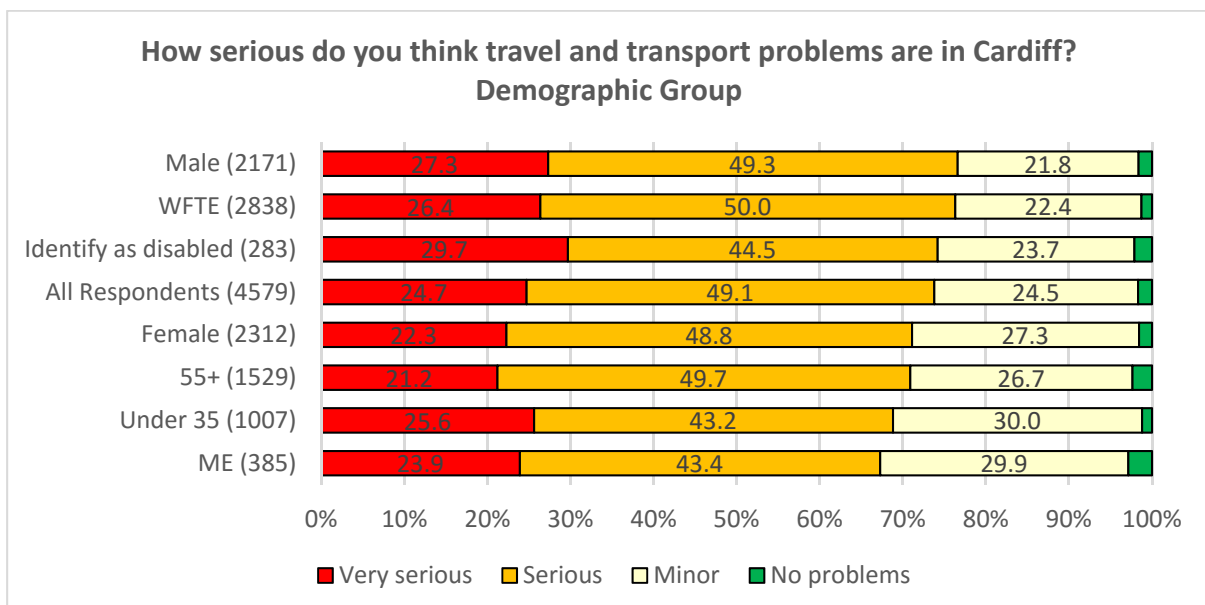
NB. There are methodological differences in 2017 compared with previous years. From 2012 to 2016, the Transport Survey was not a standalone survey and instead formed part of Cardiff Council's Ask Cardiff Survey, which covers a wide range of topics.

More than seven-tenths of respondents from each of the NPAs classified travel and transport problems in Cardiff to be either serious or very serious, with this figure being highest in Cardiff West (78.9%) and Cardiff East (77.9%). In addition, in Cardiff East over a third (34.8%) deemed them to be very serious.



Base sizes shown in brackets. Excludes 'Don't Know' responses.

Across the demographic groups the proportion of respondents classifying the travel and transport problems as either serious or very serious ranged from 67.3% for minority ethnics to 76.6% for males. However, those identifying themselves as disabled (29.7%) were most likely to find them very serious.

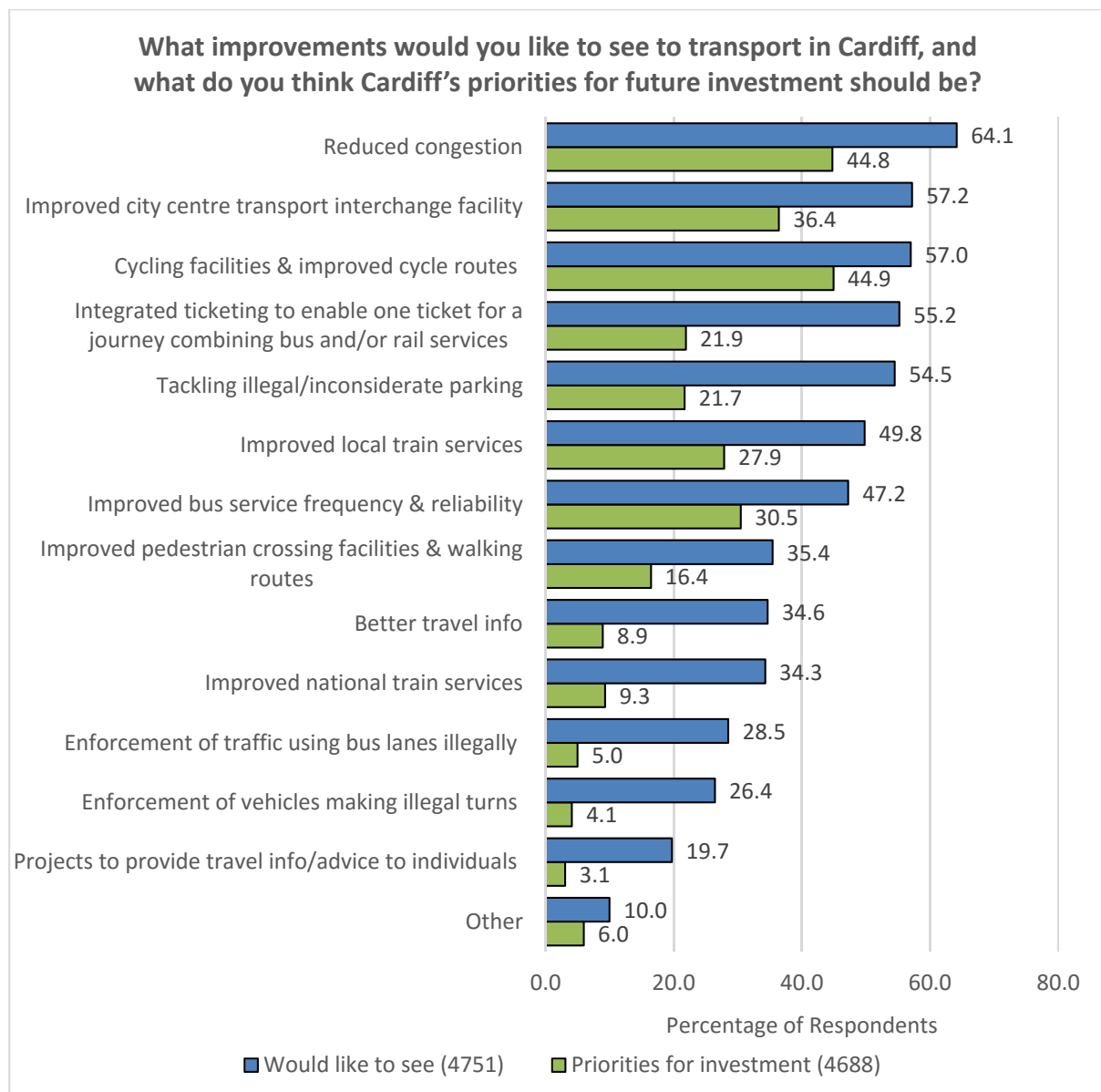


Base sizes shown in brackets. Excludes 'Don't Know' responses.

4.8 What improvements would you like to see to transport in Cardiff, and what do you think Cardiff's priorities for future investment should be?

Reduced congestion (64.1%) was the transport improvement most respondents would like to see, followed by an improved city centre transport interchange facility (57.2%), and cycling facilities & improved cycle routes (57.0%).

These were also the options that were highlighted as priorities for investment, with cycling facilities & improved cycle routes being selected by 44.9% of respondents, followed by reduced congestion (44.8%) and an improved city centre transport interchange facility (36.4%).



Over a quarter of the additional suggestions for improvement that respondents would like to see related to public transport issues (27.0%). Similarly, the most common proposal as a priority for investment was cheaper, quality public transport (29.7%).

Would like to see:		
Theme	No.	%
Public transport issues	126	27.0
Poor infrastructure & congestion	73	15.6
Poor traffic signalling/calming system	55	11.8
Bus/cycle lane issues	50	10.7
Price issues	44	9.4
Poor cycling	39	8.4
Parking issues	34	7.3
Poor driving	31	6.6
Metro/tram	16	3.4
Park & ride	10	2.1
Contactless/Oyster cards	9	1.9
Disabled access/awareness	7	1.5
20mph limit	7	1.5
Other improvements	108	23.1
Other problems	14	3.0
Miscellaneous	1	0.2
Total Respondents	467	-

Priorities for investment:		
Theme	No.	%
Cheaper, quality public transport	81	29.7
Increase enforcement	31	11.4
Improve road network/infrastructure	30	11.0
Reduce/improve traffic calming	23	8.4
More/cheaper parking	23	8.4
Reduce/change bus/cycle lanes	23	8.4
Improve road/pavement condition	18	6.6
Reduce traffic & pollution	18	6.6
Metro/tram system	15	5.5
Improve walking & cycling routes	14	5.1
Improve park & ride	14	5.1
Other improvements	42	15.4
Miscellaneous	5	1.8
Total Respondents	273	-

5.0 RESPONDENT PROFILE

5.1 Car ownership

Almost nine-tenths (88.8%) of respondents have at least one car or van available for use by members of their household. This is significantly below the 29.0% of households that stated they did not own a car/van in the 2011 Census.

In total, how many cars or vans are owned, or available for use, by members of this household? Include any company car(s) or van(s) available for private use.		
No. Cars/Vans	No.	%
None	530	11.2
1	2,105	44.4
2	1,720	36.3
3	310	6.5
4 or more	78	1.6
Total Respondents	4,743	100.0

5.2 Age

Those aged 16-24 are underrepresented in the survey; accounting for just 4.0% of respondents compared with 21.3% of the Cardiff population aged 16+. Those aged 75+ are also underrepresented, possibly due to the survey being internet-based (hard copies were only available on request), with 2.7% of responses compared with 8.0% of the population aged 16+.

What was your age on your last birthday?			
Age	Survey		Mid-2016 Estimate (ONS)
	No.	%	%
Under 16	1	-	-
16-24	188	4.0	21.3
25-34	859	18.1	19.9
35-44	1,068	22.5	15.0
45-54	1,027	21.6	14.6
55-64	879	18.5	12.2
65-74	594	12.5	9.1
75+	130	2.7	8.0
Total Respondents	4,746	100.0	100.0

NB. Percentages are based on those aged 16+

5.3 Gender

Males accounted for 47.9% of the survey, compared with 48.9% of the Cardiff population aged 16+ (2016 mid-year estimate, ONS).

Are you...?		
Gender	No.	%
Male	2,248	47.9
Female	2,432	51.8
Transgender	14	0.3
Total Respondents	4,694	100.0

5.4 Children in households

Over a quarter (26.1%) of households contained at least one child aged 4-18, with 12.8% containing at least one child aged under four.

How many children live in your household?		
Age of children	No.	%
Aged under 4	508	12.8
Aged 4-18	1,117	26.1

5.5 Working status

Three-fifths of those responding to the survey (61.8%) reported to be in full time employment. A further 12.9% were working part-time while approximately one-in-six (16.8%) were wholly retired from work.

Which of the following best describes what you are doing at present?		
Working status	No.	%
Working full time (30+ hours per week)	2,932	61.8
Working part time (less than 30 hours per week)	613	12.9
On a government training scheme	1	0.0
In full time education	104	2.2
Unemployed - Registered Job Seeker	23	0.5
On a zero hour contract	19	0.4
Permanently sick or disabled person	67	1.4
Wholly retired from work	795	16.8
Looking after home	40	0.8
Caring for a child or adult	56	1.2
Unemployed - Unregistered but seeking work	19	0.4
Other	73	1.5
Total Respondents	4,742	100.0

5.6 Housing tenure

A third (33.7%) of respondents reported to own their home outright, whilst 44.4% owned their property with a mortgage.

Which of the following best describes your housing tenure?		
Housing tenure	No.	%
Owned outright	1,587	33.7
Owned with a mortgage	2,095	44.4
Rented from the Local Authority	90	1.9
Rented from a Housing Association	113	2.4
Private rented	750	15.9
Other	81	1.7
Total Respondents	4,716	100.0

5.7 Disability

6.4% of respondents identified themselves as disabled.

Do you identify as a disabled person?		
Response	No.	%
Yes	298	6.4
No	4,292	91.5
Prefer not to say	100	2.1
Total Respondents	4,690	100.0

5.8 Medical conditions

All respondents were given a list of medical conditions and asked if any applied to them. Of the 1,050 people that answered the question, two-fifths (39.7%) reported having a long-standing illness or health condition, while a fifth (20.3%) were deaf/deafened/hard of hearing.

Please tick any of the following that apply to you:		
Condition	No.	%
Deaf/Deafened/Hard of hearing	213	20.3
Mental health difficulties	176	16.8
Learning impairment/difficulties	33	3.1
Visual impairment	53	5.0
Wheelchair user	19	1.8
Mobility impairment	197	18.8
Long-standing illness or health condition (e.g. cancer, HIV, diabetes, or asthma)	417	39.7
Prefer not to say	180	17.1
Other	50	4.8
Total Respondents	1,050	-

NB. Percentages do not sum to 100.0% as respondents could give multiple answers

5.9 Religion

Less than two-fifths (38.5%) stated that they belonged to a particular religion.

Do you regard yourself as belonging to any particular religion?		
Response	No.	%
Yes	1,794	38.5
No, no religion	2,868	61.5
Total Respondents	4,662	100.0

Of those belonging to a religion, nearly nine-tenths (88.7%) defined themselves as Christian.

If yes, please specify:		
Religion	No.	%
Buddhist	16	0.9
Christian (Including Church in Wales, Catholic, Protestant and all other Christian denominations)	1,584	88.7
Hindu	19	1.1
Jewish	8	0.4
Muslim	48	2.7
Sikh	4	0.2
Other	33	1.8
Prefer not to answer	73	4.1
Total Respondents	1,785	100.0

5.10 Sexual orientation

The majority of respondents (81.0%) described their sexual orientation as heterosexual/straight. Meanwhile, 2.5% were gay men, 2.5% bisexual and 1.5% gay women/lesbian.

How would you describe your sexual orientation?		
Sexual orientation	No.	%
Bisexual	117	2.5
Gay Woman/Lesbian	67	1.5
Gay Man	116	2.5
Heterosexual/Straight	3,724	81.0
Other	17	0.4
Prefer not to answer	555	12.1
Total Respondents	4,596	100.0

5.11 Marital status

Over half of respondents (53.5%) reported themselves to be married, while just over a fifth (21.5%) were single.

Are you:		
Marital status	No.	%
Single	990	21.5
In a same-sex Civil Partnership	33	0.7
Married	2,466	53.5
Living together	769	16.7
Separated/divorced or legally separated if formerly in a same-sex Civil Partnership	222	4.8
Widowed	132	2.9
Total Respondents	4,612	100.0

5.12 Ethnicity

Those of a White British background were slightly overrepresented in the survey; accounting for 87.2% of respondents compared to 82.1% of the Cardiff population aged 16+ (2011 Census).

What is your ethnic group?		
Ethnic Group	No.	%
White - Welsh/English/Scottish/Northern Irish/British	4,082	87.2
White - Irish	33	0.7
White - Gypsy or Irish Traveller	2	0.0
White - Any other white background	173	3.7
Mixed/Multiple Ethnic Groups - White and Black Caribbean	21	0.4
Mixed/Multiple Ethnic Groups - White and Black African	6	0.1
Mixed/Multiple Ethnic Groups - White & Asian	25	0.5
Mixed/Multiple Ethnic Groups - Any other	10	0.2
Asian/Asian British - Chinese	12	0.3
Asian/Asian British - Pakistani	17	0.4
Asian/Asian British - Bangladeshi	7	0.1
Asian/Asian British - Indian	41	0.9
Asian/Asian British - Any other	10	0.2
Black/African/Caribbean/Black British - African	12	0.3
Black/African/Caribbean/Black British - Caribbean	11	0.2
Black/African/Caribbean/Black British - Any other	0	0.0
Arab	10	0.2
Any other ethnic group	13	0.3
Prefer not to say	197	4.2
Total Respondents	4,682	100.0