

Less Mobile, Car Reliant

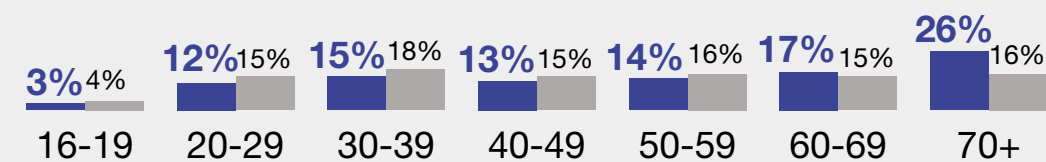
■ Segment 1 ■ All segments

Who are they?

Gender

Male **♂52%** 49% Female **♀48%** 51%

Age



Mobility difficulties impacting travel



Ethnicity

90% 88% White **10%** 11% Ethnic Minority

Household finances

Under £25,000 **45%** 40%
 £25,000 - £59,999 **32%** 33%
 Over £60,000 **14%** 13%

People in this segment are likely to have a mobility impairment and tend to use a car as their primary mode of transport; this also includes mobility cars or vehicles that have been adapted for their mobility needs. Choosing which mode of transport to use is often influenced by convenience. Typical journeys are short (under 10 miles), to the shops or to see family. They travel primarily by car as it's more convenient and accessible compared with using public transport. Cars also provide space to transport large shopping bags and other heavy objects.

This segment has seen little in the way of major changes in transport use during the pandemic, beyond a reduction in some frequent journeys. In some cases, those in employment are working from home several days a week. They prefer to use public health precautions when on public transport.

Brian



- **Age:** 51
- **Lives:** Darwen, Lancashire
- **Household composition:** Married, living with wife and two children
- **Employment:** Works part-time (3 days/week), fully remotely; admin officer for Preston City Council
- **Disability/Health:** Full-time wheelchair user
- **Tenure:** Homeowner, without mortgage
- **Interests and concerns:** Spending time with daughters but concerned how his mobility is going to impact them

Betty



- **Age:** 71
- **Lives:** Near Lowestoft, Suffolk
- **Household composition:** Married, living with husband; two adult children, one lives in London, the other in Canada
- **Employment:** Retired for 10 years, former medical secretary
- **Disability/Health:** Arthritis of the hip which impacts her ability to travel actively
- **Tenure:** Homeowner, without mortgage
- **Interests and concerns:** Loves seeing her grandchildren but worried about their future – prices going up, global instability...

Enablers and barriers to different transport modes

- ### Car
- ✓ Convenience
 - ✓ Flexibility
 - ✓ Spontaneity
 - ✓ Transporting heavy items
 - ⊗ Traffic
 - ⊗ Lack of parking spaces

- ### Walking
- ✓ For short distances
 - ✓ For leisure
 - ⊗ Mobility issues
 - ⊗ Poor weather

- ### Public Transport
- ✓ Train was perceived as more suitable for long distance journeys
 - ✓ Bus was perceived as more suitable for short, local journeys (e.g. to hospital)
 - ✓ Bus fares were perceived as more affordable (especially with a bus pass)
 - ✓ Train was perceived as a fast option for public transport travel
 - ✓ An enjoyable way to travel
 - ✓ No parking concerns
 - ⊗ Distance to station/bus stops
 - ⊗ Lack of regular services (delays, cancellations)
 - ⊗ Bus services were perceived as slow
 - ⊗ Train fares were perceived as expensive
 - ⊗ Anxiety inducing for some (safety concerns, lack of control, lack of familiarity)
 - ⊗ Lack of space for carrying heavy items

General transport habits

- **Majority of trips are by car**, which is adapted to Brian's needs.
- **Driving less** since becoming a permanent homemaker following the pandemic.
- **Occasionally uses the bus** when going for a family day out.
- **Uses train** if going on a short city break in the UK.
- **Prefers to drive on a motorway than around the village** because he feels that local roads need more maintenance and the quality of other people's driving on local roads is bad.

General transport habits

- **Very reliant on the car** for everyday travel.
- **Very few journeys are long distance** – usually a short drive to the shops or to visit family and friends locally.
- **Uses public transport for very specific trips:** once or twice a year she will get the train into London to visit her son and see the sights or use the bus to get to and from the hospital to avoid parking charges.
- **Public transport is generally unappealing**, with concerns about the behaviour of other passengers which has been exacerbated due to the pandemic.

Where percentages do not add up to 100%, this is due to rounding or exclusion of 'Don't know' and 'Prefer not to say' answer codes.

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- **Tenure:** Homeowner, without mortgage
- **Interests and concerns:** Spending time with daughters but concerned how his mobility is going to impact them

General transport habits

Most of Brian’s trips are by car, which is adapted to his needs. He drives less now, since becoming a permanent homeworker following the pandemic. He and his family might use the bus when going for a day out to a nearby town. And they will use a train if going on a short city break within the UK. Brian would rather drive on a motorway than around the village because he finds the quality of other people’s driving is bad and has diminished since the pandemic. While Brian acknowledges recent local repairs, he feels like the local roads need more maintenance.

Frequent journey

The school run for his two daughters 5 times a week by car.

- ✓ Familiar with routes and traffic patterns
- ✓ No need to plan
- ✗ Parking is limited outside schools
- ✗ Roads often in poor condition

“The condition of the roads is a bit mixed - one of the main roads on the school run has recently been re-laid, so it’s good. However other bits are in a much poorer condition and collapsing into potholes.”



Less frequent journey

UK city break with family via train, 1 to 2 times a year.

- ✓ More accessible than flying
- ✓ Local station has more accessible infrastructure
- ✓ Can chose accessible seating at no extra cost
- ✓ Can book ahead for support at station and on train
- ✗ Staff experience at station and on-board can be very variable
- ✗ Local train operators not equipped to help

“It depends on the station. Even though you’ve booked assistance, the guards on the local trains don’t know you’re getting on the train. There’s usually a bit of a panic, will they have a ramp etc?”

Opportunities for Change

Key factors in decision making:

- **Accessibility** - support at hubs or on separate modes
- **Convenience** - impact of poor weather, familiarity with route, likelihood of traffic, frequency of services

Would like to use buses more:

- ✗ Infrequent services – often 30 mins between buses
- ✗ Limited space for wheelchair users – only one per bus
- ✗ Weather/lack of shelter between services

Would like to use trains more:

- ✓ Good access at local station (supportive staff, lifts that work, ramps, etc)
- ✓ Mainline station staff are helpful
- ✗ Poor support on local services – staff aren’t equipped to help
- ✗ Lift doesn’t always work
- ✗ Rail replacement services
- ✗ Stressful

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- **Disability/Health:** Arthritis of the hip which impacts her ability to travel actively
- **Tenure:** Homeowner, without mortgage
- **Interests and concerns:** Loves seeing her grandchildren but worried about their future – prices going up, global instability...

General transport habits

Betty is very reliant on the car (as driver and as passenger) for everyday travel, though few journeys she makes are long distance – it’s usually a short drive to the shops or to visit family and friends locally. She uses public transport for very specific trips: once or twice a year, she’ll get the train into London to visit her son and see the sights; or she will use the bus to get to and from the hospital, therefore avoiding the associated parking charges. Public transport is generally unappealing to Betty, with concerns about the behaviour of other passengers.

She also tries to avoid taking public transport during rush hour due to worries about Covid and struggles to stay active due to arthritis of the hip.

“Last time I went on the bus I was the only person on it wearing a mask.”

Frequent journey

The “big shop” once a week by car.

- ✓ Car required to transport heavy bags
- ✓ No need to walk and aggravate hip condition
- ✗ Doesn’t like home delivery – prefers to select her own groceries
- ✗ Walking to shops not an option with hip condition and heavy bags
- ✗ Buses not an option with heavy bags

“I don’t use the high street for food shopping because you’ve got to carry it back. So I tend to go in a car when I go to get groceries and things because you can’t carry it back, and I like to do a big shop.”

Less frequent journey

Drive to the airport for holiday abroad, once a year.

- ✓ Local airport nearby
- ✓ Only an hour’s drive
- ✓ Long stay parking is easily accessible
- ✓ Get home quickly after long flight
- ✗ Public transport would be complicated, multistage, and impossible late at night

“When you get off the plane, 20 minutes later you’re driving home, and you’re home in an hour. An hour-and-a-half after you get off the plane, you’re making a cup of tea, that’s lovely. So, being near an airport that went somewhere would be nice.”

Opportunities for Change

Key factors in decision making:

- Reason for trip - transporting heavy items, need for parking, spontaneity
- Distance - short distances allow for walking

Would like to use buses more:

- ✗ Crowded services – can’t carry heavy bags
- ✗ Infrequent or lack of direct services to desired destination
- ✗ Uncomfortable with proximity to lots of other passengers
- ✗ Weather / lack of shelter between services

Would like to use trains more:

- ✓ Long distance trips
- ✓ Driving not viable (i.e. driving into London)
- ✗ Doesn’t go to useful destinations (i.e. hospital or airport)

“The bus has to run much more regularly. But, even then [...] a return trip to the hospital would involve having to intersect with another bus route, wait around for another bus, and then do the same thing going back, so it would be very time consuming.”

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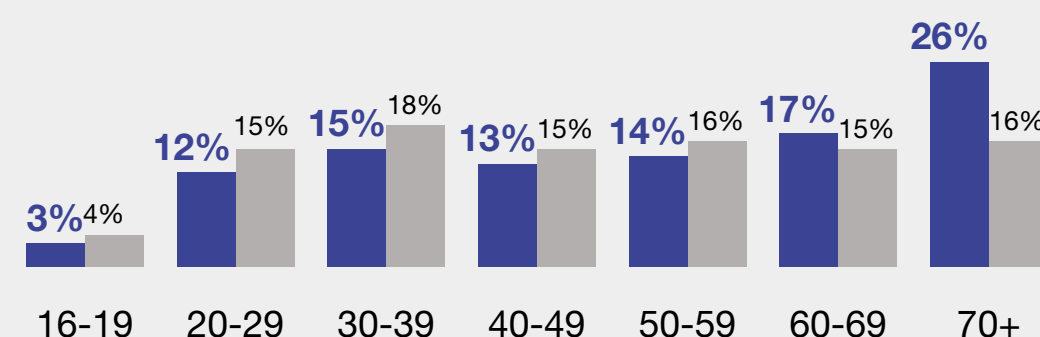
■ Segment 1 ■ All segments

Who are they?

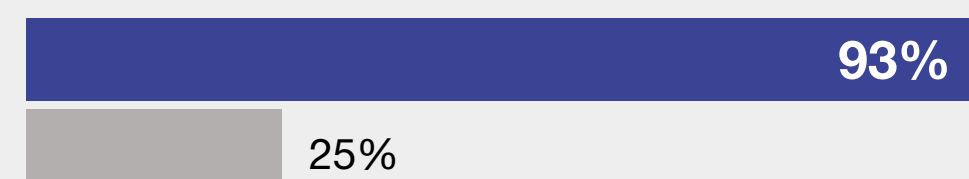
Gender

Male **♂52%** 49% Female **♀48%** 51%

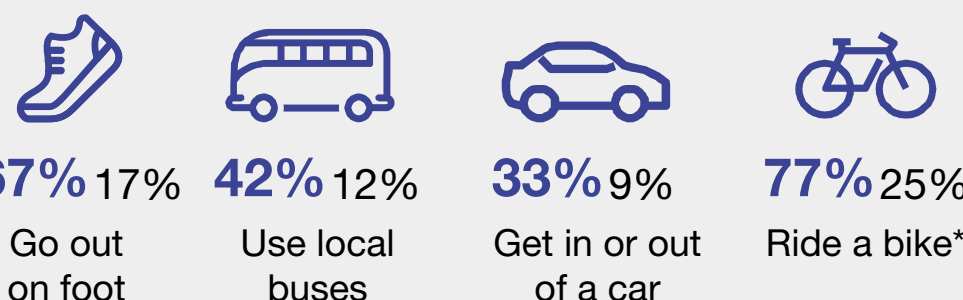
Age



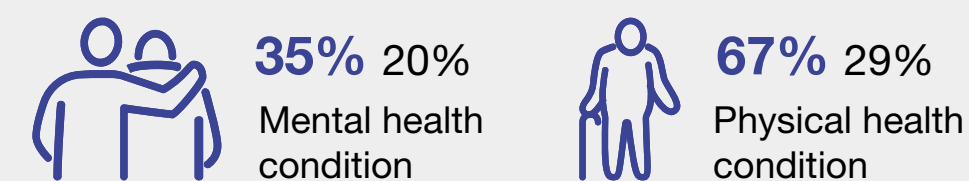
Mobility difficulties impacting travel



Disability/long standing health condition that makes it difficult (*impossible/difficult) to:



Mental health/physical health condition:

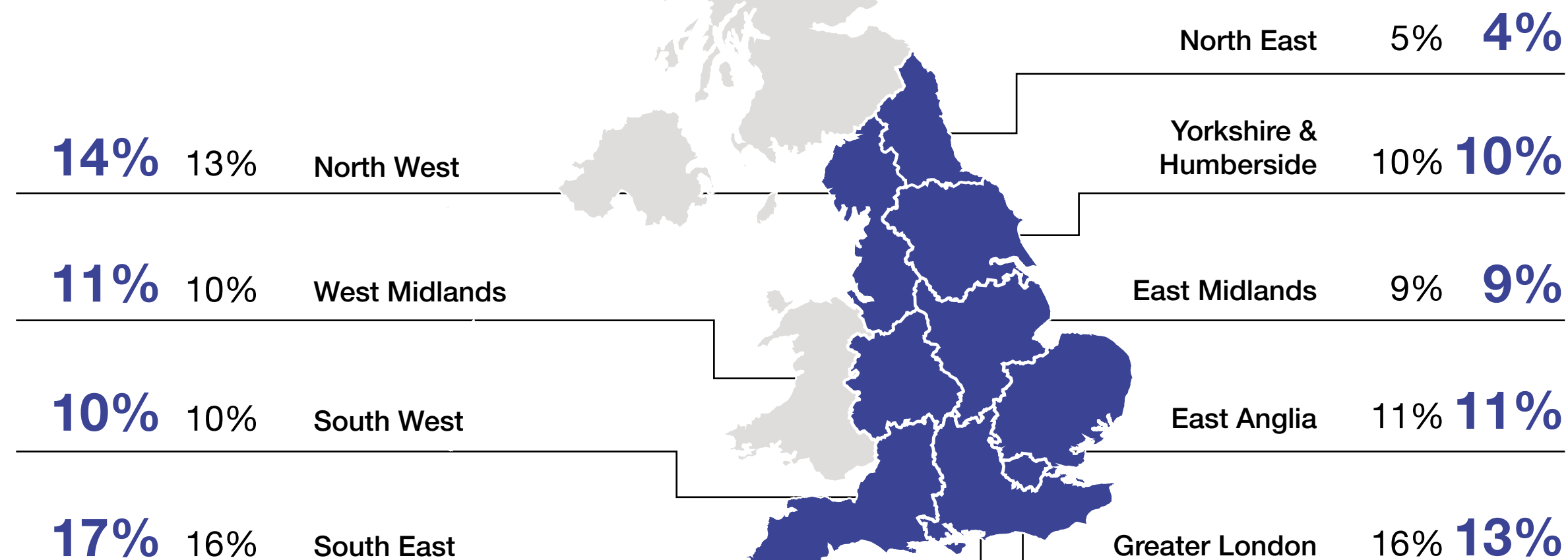


Ethnicity

90% 88% White 10% 11% Ethnic Minority

Location

Urban **76%** 78% Rural **16%** 14%



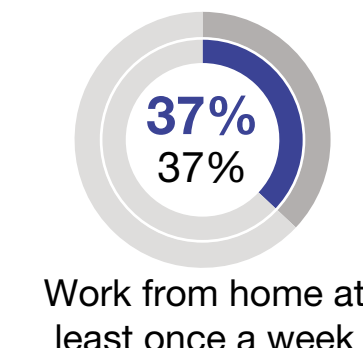
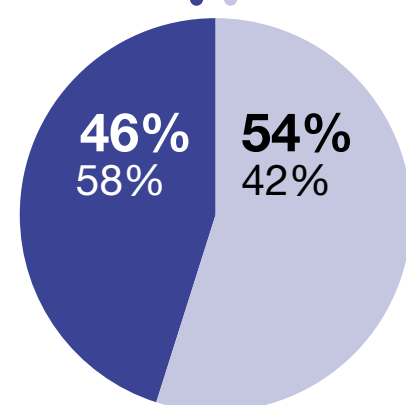
Employment & working patterns

Working

- 31% 39% Full-time employed
- 9% 14% Part-time employed
- 6% 6% Self employed

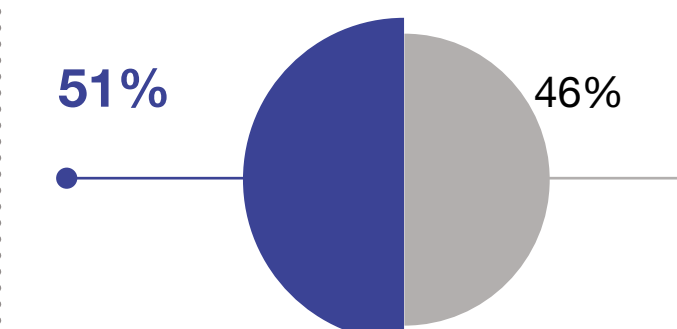
Not working

- 32% 23% Retired
- 14% 10% Unemployed
- 5% 5% Parent-homemaker
- 4% 5% Student/Pupil



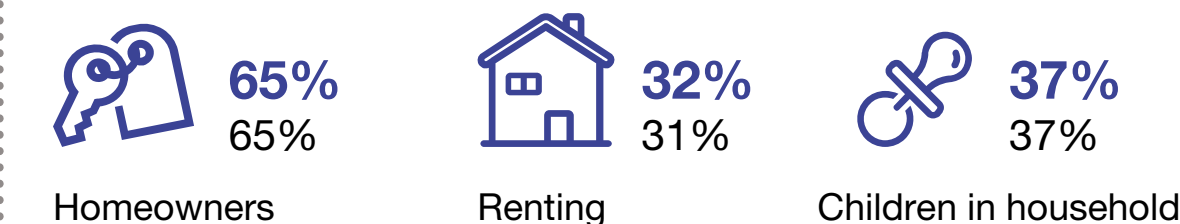
Shopping behaviours

Regularly use home delivery for food or non-food shopping



Household & financials

Household



Household finances

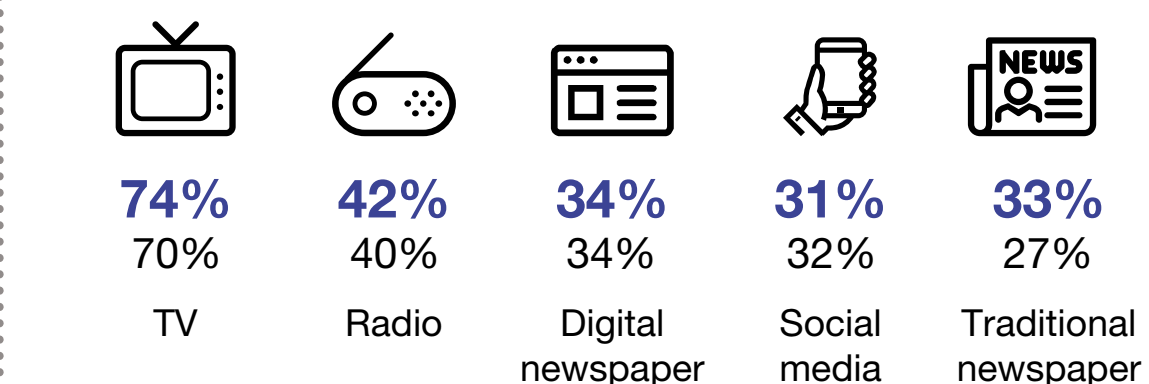
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- £25,000 - £59,999: 32% 33%
- Over £60,000: 14% 13%

Technology & media

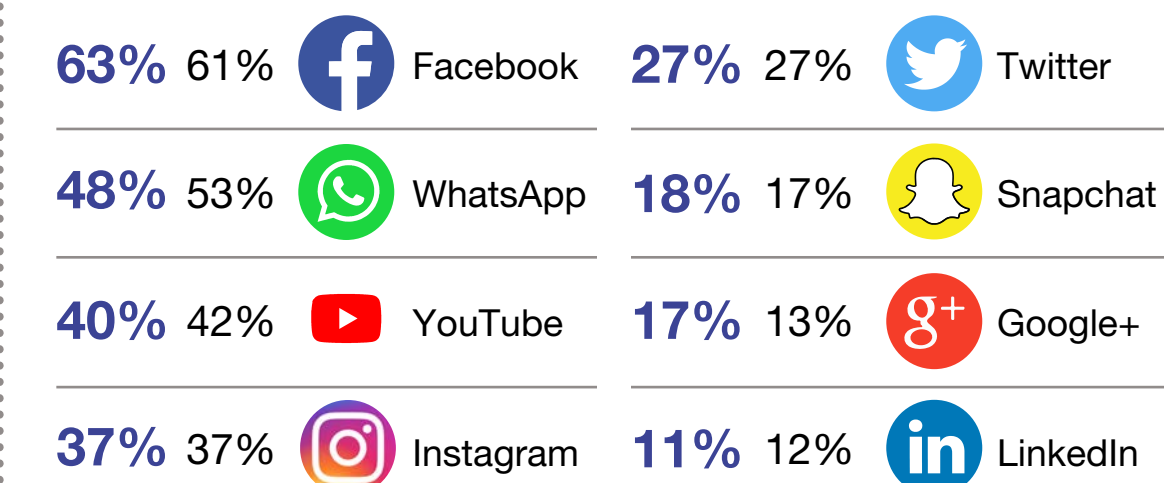
Use of smartphones



Consumption of news



Social media



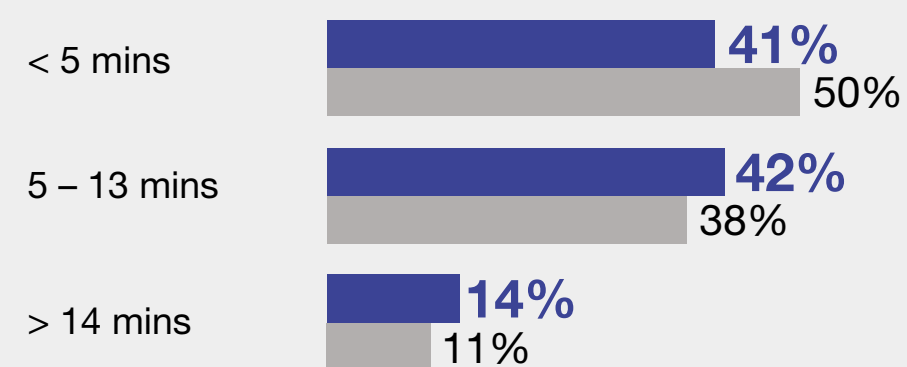
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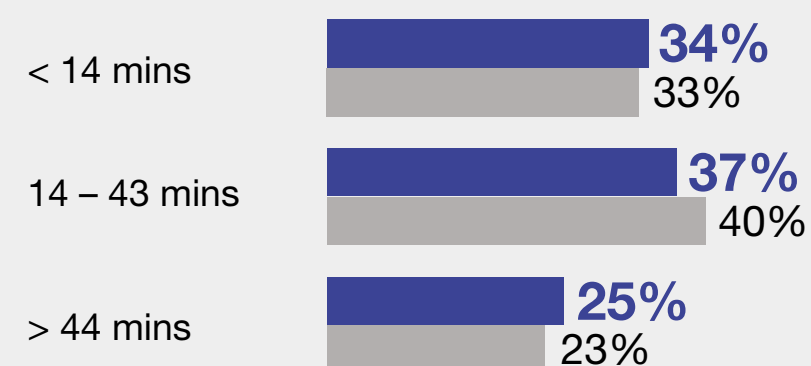
■ Segment 1 ■ All segments

Access to transport

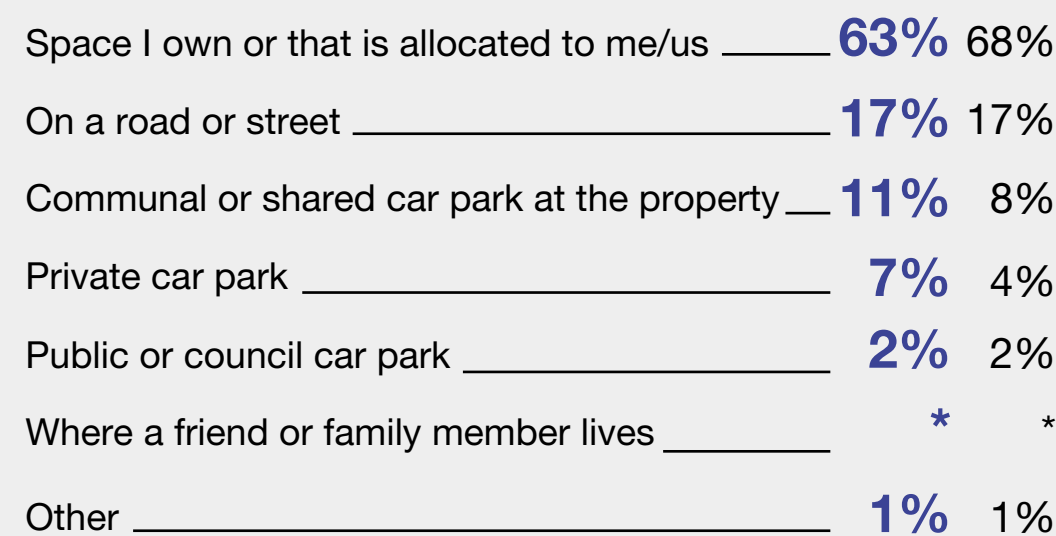
Distance to nearest bus stop (mins walk)



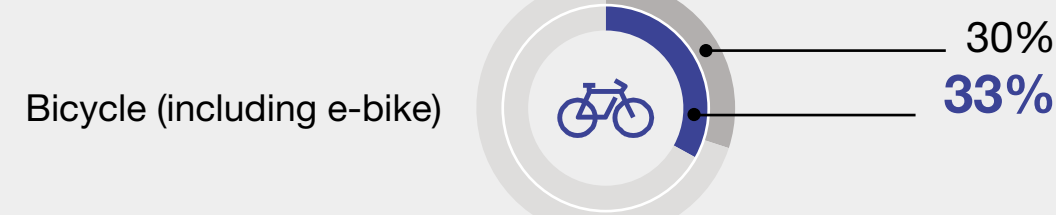
Distance to nearest railway station (mins walk)



Parking their vehicles



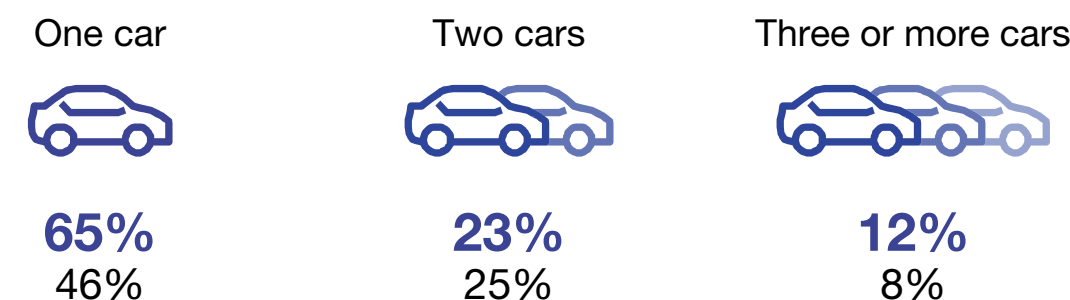
Access to:



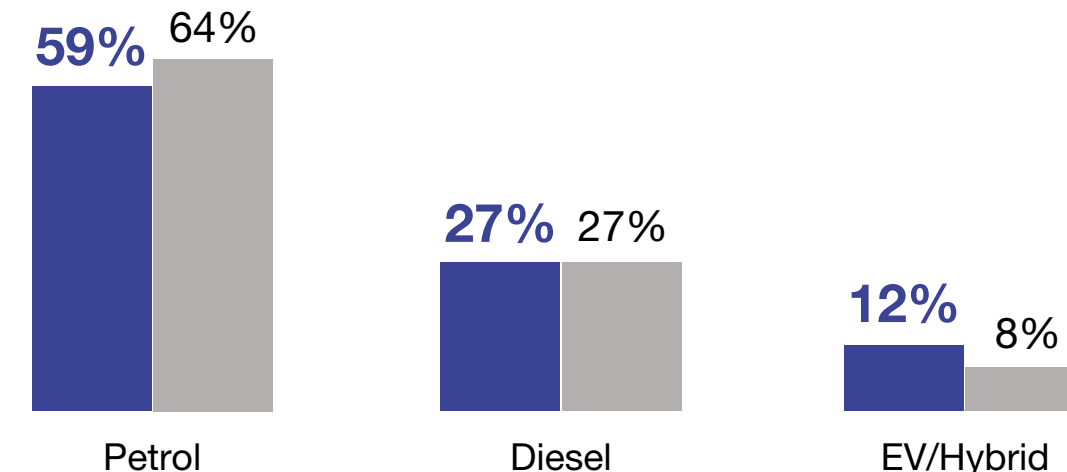
* represents figures < 1%

People in this segment tend to use a car as their primary mode of transport. This also includes mobility cars or vehicles that have been adapted for their mobility needs.

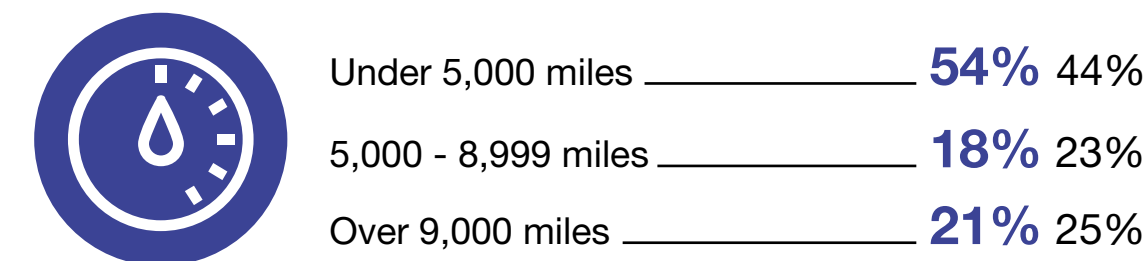
Number of cars in household



Car type



Number of miles driven per year

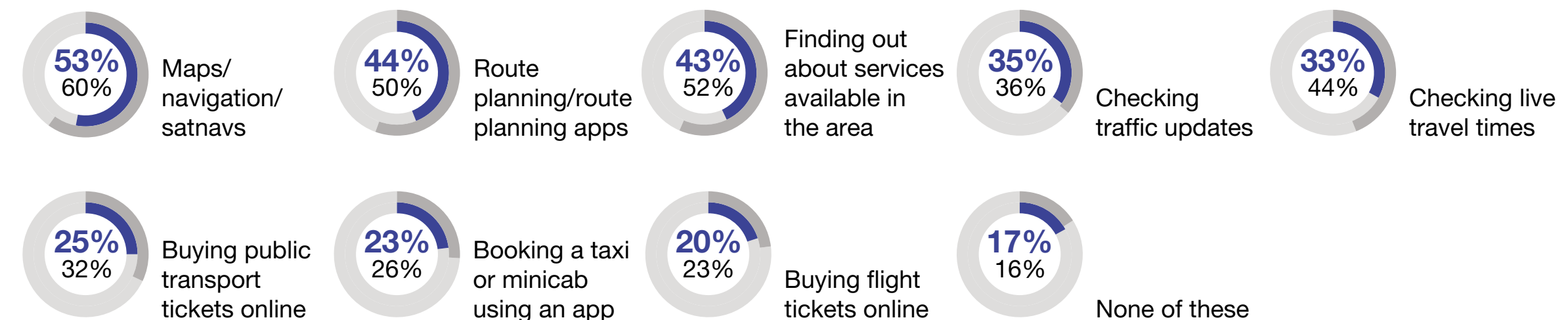


Strategic Road Network usage (Motorways and A-roads)



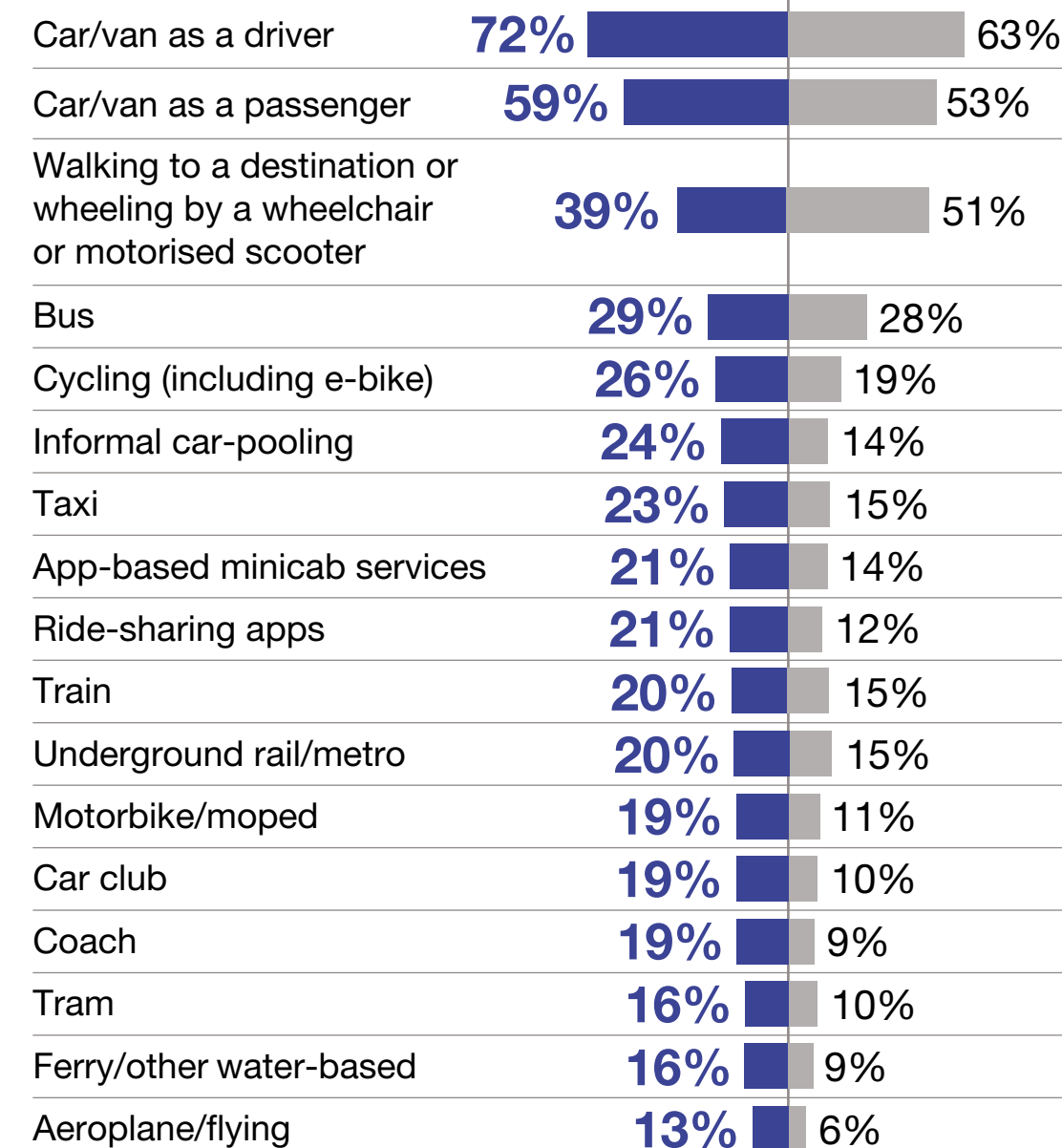
Understanding transport choices

Journey planning. Smartphones are used for:

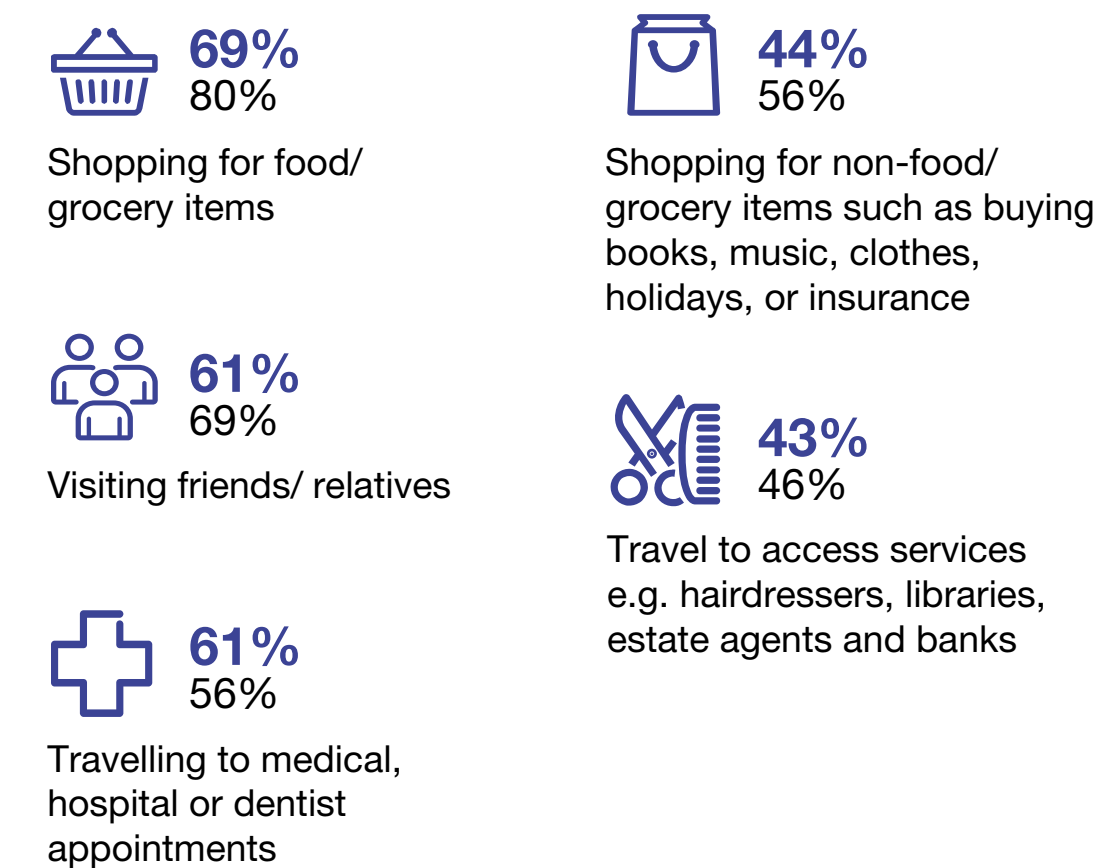


Mode use and frequency

Modes used once a week or more (last 6 months)



Top 5 journey purposes (last 6 months)

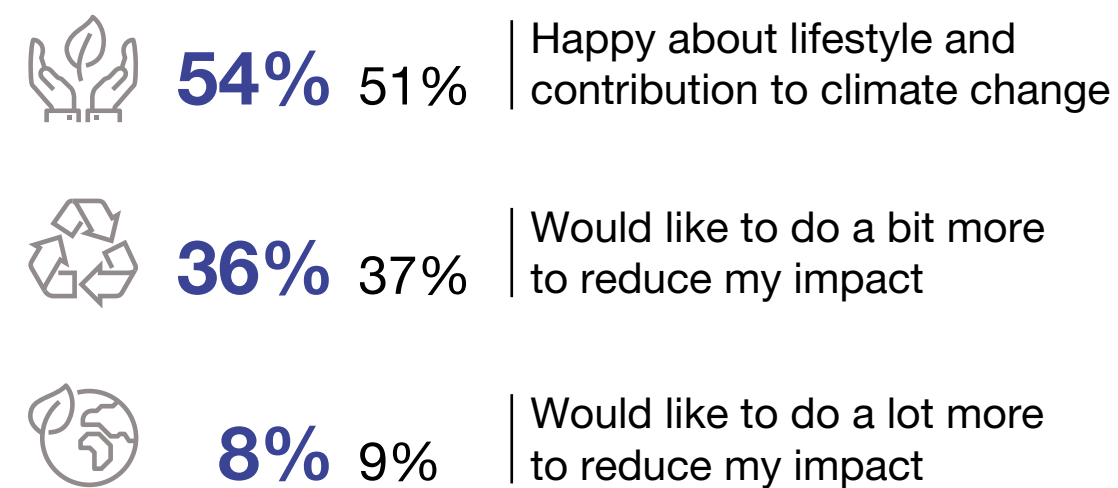


Flight taken in last 12 months





This segment has seen little in the way of major changes in transport use during the pandemic, beyond a reduction in some frequent journeys. While they are travelling less overall, they still have regular routines. In some cases, those in employment are travelling less due to working from home several days a week. Any travelling that they do is primarily done by car (or mobility vehicle). There is a belief that the roads are becoming more dangerous, with concerns about the conduct of other road users. They prefer to use public health precautions when on public transport.



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Enablers and barriers to different transport modes

Car

- ✓ Convenience
- ✓ Flexibility
- ✓ Spontaneity
- ✓ Transporting heavy items
- ✗ Traffic
- ✗ Lack of parking spaces

Walking

- ✓ For short distances
- ✓ For leisure
- ✗ Mobility issues
- ✗ Poor weather

Public Transport

- ✓ Train was perceived as more suitable for long distance journeys
- ✓ Bus was perceived as more suitable for short, local journeys (e.g. to hospital)
- ✓ Bus fares were perceived as more affordable (especially with a bus pass)
- ✓ Train was perceived as a fast option for public transport travel
- ✓ An enjoyable way to travel
- ✓ No parking concerns
- ✗ Distance to station/bus stops
- ✗ Lack of regular services (delays, cancellations)
- ✗ Bus services were perceived as slow
- ✗ Train fares were perceived as expensive
- ✗ Anxiety inducing for some (safety concerns, lack of control, lack of familiarity)
- ✗ Lack of space for carrying heavy items



Attitudes towards transport and climate

This segment is relatively unconcerned with the environmental impact of their car use. This is partly due to their reliance on using cars (as drivers and as passengers), and their belief that there is a lack of convenient or practical alternatives. Developments such as low emission zones and electric vehicles are seen as good things, but there is also a sense that electric vehicles are too expensive and, therefore, inaccessible to them as alternatives to their current modes of transport.

"I think that some of my visits to the allotment could possibly be done with an e-bike. But that's about the only thing that would be. Maybe some of my journeys to the supermarket could possibly done with an e-bike or a motorbike. But again, there's costs involved in the acquiring of such things. So it's not something that I'm immediately considering."
(Male, 68, Southampton)

"I wouldn't shop in any other way because it would be impractical to do that. The regular journey to visit my mother-in-law, I use public transport anyway. The other one particular regular journey I do once a week is a walk with my friend. I suppose we could not drive somewhere and walk, we could walk from our home. That's the journey that you could easily do without the transport." (Female, 67, Great Yarmouth)