

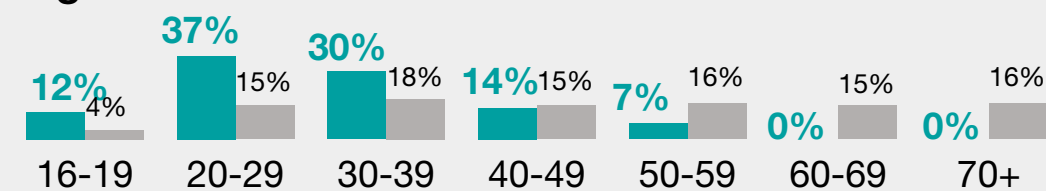
■ Segment 2 ■ All segments

Who are they?

Gender

Male **♂46%** 49% Female **♀54%** 51%

Age



Mobility difficulties impacting travel

3% 25%

Ethnicity

81% 88% White **18%** 11% Ethnic Minority

Household finances

Under £25,000 **36%** 40%
 £25,000 - £59,999 **38%** 33%
 Over £60,000 **8%** 13%

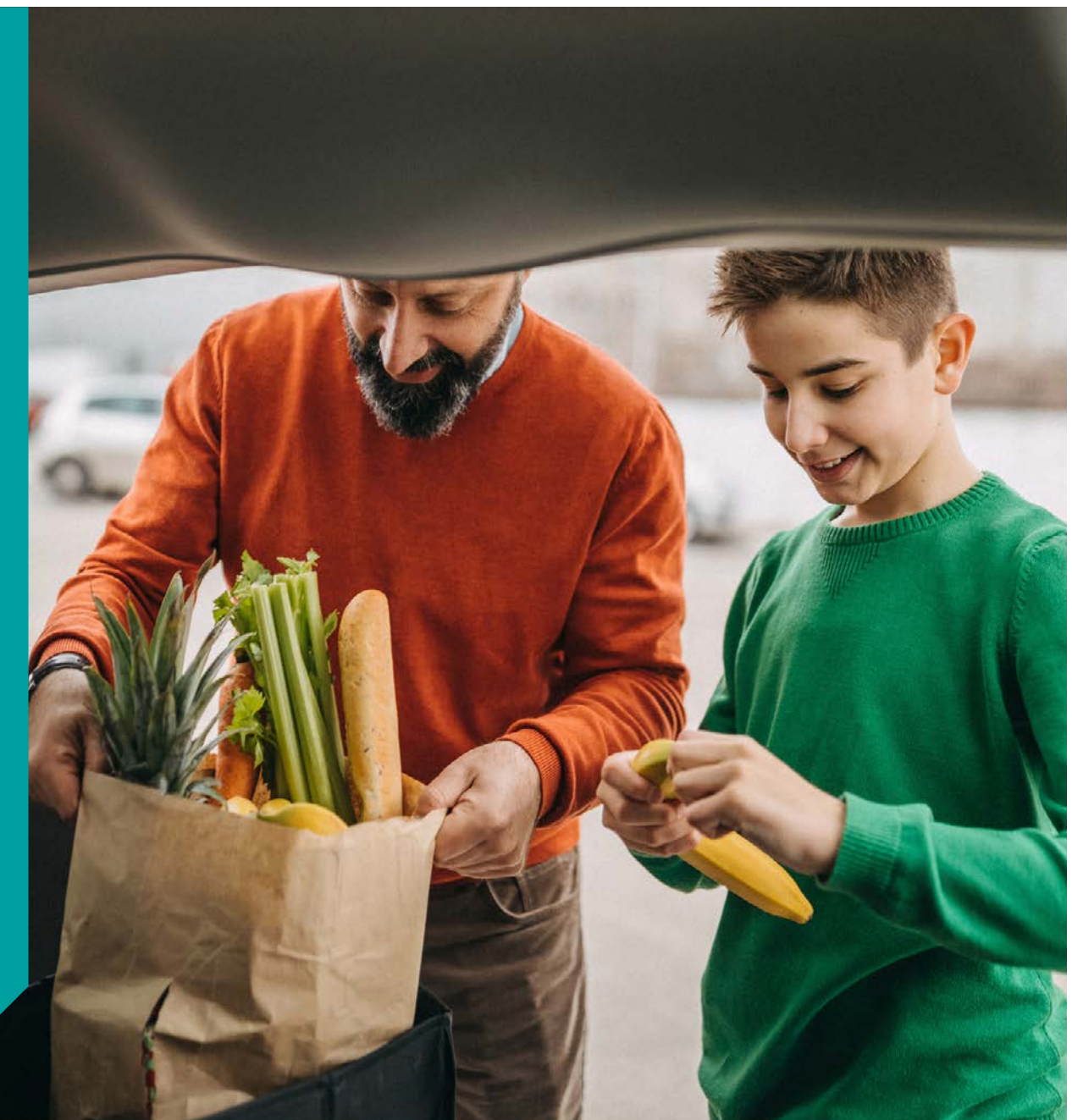
People in this segment are part of young families who live in urban areas in England. They have children in the household and their routines are built around balancing childcare and work responsibilities.

They are one-car households and use the car as their primary mode of transport, rarely making use of public transport modes. Despite having good access to public transport in their local area, driving is their preferred mode of transport. It is seen as more convenient and cost-effective for their personal needs and circumstances. They drive to work, for school drops and pick-ups, for shopping at big supermarkets and to see friends and family.

Farah



- **Age:** 35
- **Lives:** Little Horton, Bradford
- **Household composition:** Married, living with husband, 7 year old daughter, and their dog
- **Employment:** Works full time in recruitment, 2-4 days per week works at home
- **Disability/Health:** No
- **Tenure:** Shared ownership (with housing association)
- **Interests and concerns:** Concerned about cost of living and the economy



Enablers and barriers to different transport modes

Car

- ✓ Convenient
- ✓ Time-efficient
- ✓ More cost-effective than using public transport when travelling as a family
- ✓ Personal choice/preference for driving
- ✓ Familiarity/ Confidence
- ✗ Safety concerns (rural roads, evening driving on roads with poor lighting)
- ✗ Cost of fuel
- ✗ Parking availability
- ✗ Confidence driving on less familiar routes

Walking

- ✓ Recreation/leisure
- ✓ Suitable for short journeys
- ✓ Health benefits
- ✓ Cheapest mode
- ✓ Environmental benefits
- ✓ More suitable in summer
- ✗ Convenience
- ✗ Time/journey duration
- ✗ Not suitable for long journeys
- ✗ Poor weather

Cycling

- ✓ Bike sharing with family members (reduced cost)
- ✓ Health benefits: recreation/keeping fit
- ✓ Environmental benefits
- ✗ Personal choice
- ✗ Past negative experiences e.g. fear of bike being stolen
- ✗ Competition from more convenient modes, e.g. car

Public Transport

- ✓ Can provide an opportunity for disconnecting/catch-up on work
- ✓ Frequent and reliable services
- ✓ Bus stops/train stations in close proximity
- ✓ Cheaper/discounted travel
- ✓ Environmental benefits
- ✓ Perceived as more suitable for long journeys
- ✗ Concerns about personal safety
- ✗ Cost – of trains, in particular
- ✗ Regularity and reliability of services
- ✗ Duration of journeys - longer compared with car
- ✗ Can be stress-inducing when services crowded

General transport habits

- **One car household** – Farah and her husband split their use of the car depending on when they need to go to their respective places of work.
- **Only uses car for trips to the larger supermarkets or for work.**
- **Often have to plan ahead** who needs the car as they also need to take their daughter to school.
- **Farah’s office is in Leeds**, which is a 30 minute drive via the M62.
- **Likes to walk to local shops** for groceries and to walk the dog.
- Farah feels that **public transport is less convenient and more expensive** than driving.
- She would use trains for **less frequent journeys**, or when the car is not available
- Farah is **not keen on cycling**, but she is open to sharing a bike with other members of the family and use it for short and/or leisure trips.



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General transport habits

Farah and her husband are a one car household – they share the car between the days they each need to commute, with Farah tending to avoid doing so on Mondays and Fridays. Her husband also works mostly from home – they arrange it so they go into work on different days and balance who does the school run. Farah’s office is in Leeds, which is a 30 minute drive via the M62.



Frequent journey

Driving to work, dropping daughter off at school on the way; twice a week, typically.

- ✓ Easy to do in one go – school is a 10 minute drive from home
- ✓ Drop daughter off, then head to the M62 to get to Leeds
- ✓ No need to plan – has a good sense of when things are busy and how long each leg takes
- ⊗ Might set off 15 minutes early to account for potential traffic congestion

“To be honest, we don’t plan it that much other than just check the roads to see if there have been any accidents or anything like that. So I might put it into Google Maps or something just to check the route. It’s a journey that we’ve done a lot over the years.”



Less frequent journey

Train trip to London to see family; once every 3-4 months.

- ✓ Easy to use if travelling alone, without the children
- ✓ Straightforward connections: bus (or walk) to Bradford, local train to Leeds, InterCity to London
- ✓ No need to worry about parking the car
- ⊗ Train feels more expensive than driving
- ⊗ Uses public transport to get around London, though doesn’t enjoy crowding
- ⊗ Generally cutting back on these trips to save money

“There have been occasions where I have got the train [...] and it’s only a two-minute walk from the train station to my office, but on the whole, it tends to be car because it’s convenient to use it. Train prices have crept up as well so I wouldn’t want to be frequently getting the train..”



Opportunities for Change

Key factors in decision making:

- **Convenience** - speed of journey, ease of travelling with daughter
- **Cost** - cheaper is better, increasingly aware of rising prices
- **Familiarity** - frequently used modes or routes are preferred to trying new and more risky options

Would like to use public transport more:

- ⊗ More expensive than driving
- ⊗ Might move away from urban areas, to somewhere less well-connected
- ⊗ Second child might reduce scope for leisure use of public transport

“I didn’t really use the car that much because I pretty much live where I work for most of the week. If we move and I start doing longer journeys, or my husband does longer journeys, we’ll need another car.”

Potential for becoming heavier car user in the future – might get a second car if:

- Have a second child
- Moving out of Bradford - will need a car to get around
- Change job with more time in the office
- Too expensive to travel as a family by train

Young Urban Families

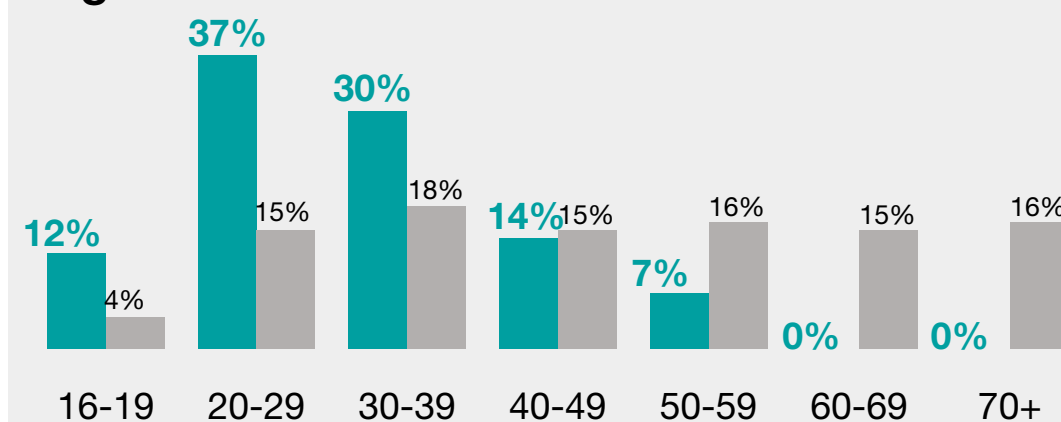
■ Segment 2 ■ All segments

Who are they?

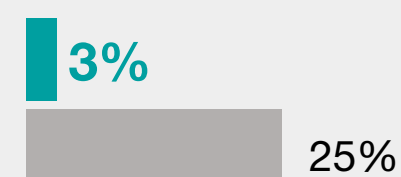
Gender

Male **♂46%** 49% Female **♀54%** 51%

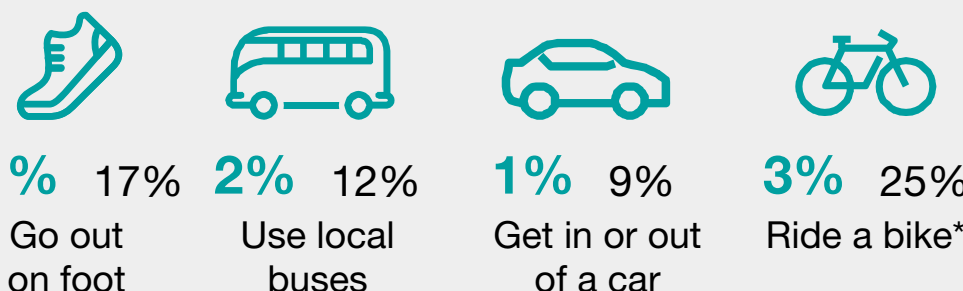
Age



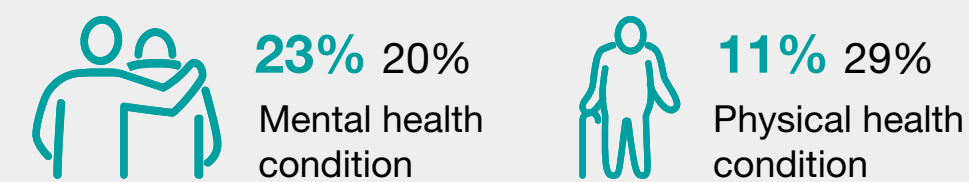
Mobility difficulties impacting travel



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



Mental health/physical health condition:



Ethnicity

81% 88% White | 18% 11% Ethnic Minority

Location

Urban **78%** 78% | Rural **9%** 14%

12% 13% North West

12% 10% West Midlands

12% 10% South West

18% 16% South East

North East 5% **5%**

Yorkshire & Humberside 10% **9%**

East Midlands 9% **9%**

East Anglia 11% **10%**

Greater London 16% **13%**

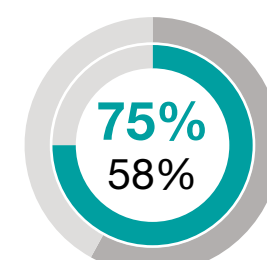
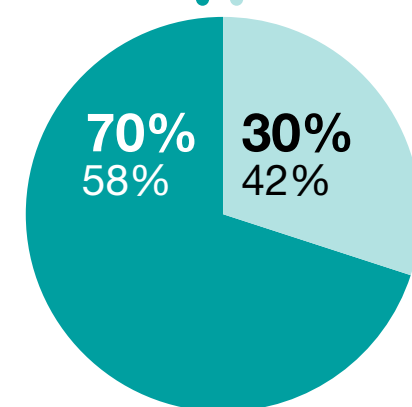
Employment & working patterns

Working

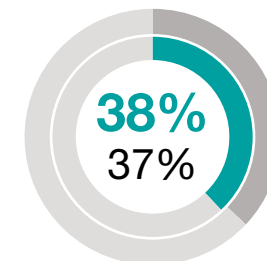
- 47% 39% Full-time employed
- 19% 14% Part-time employed
- 4% 6% Self employed

Not working

- 14% 5% Student/Pupil
- 7% 10% Unemployed
- 7% 5% Parent-homemaker
- 1% 23% Retired



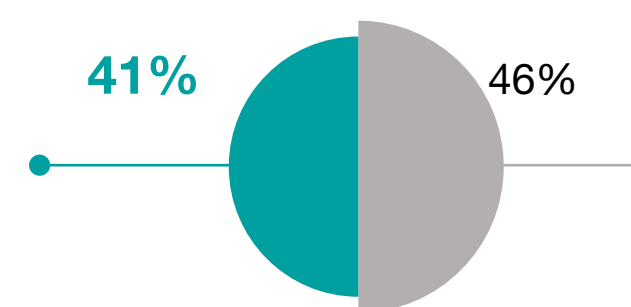
Travel to a place of work at least once a week



Work from home at least once a week

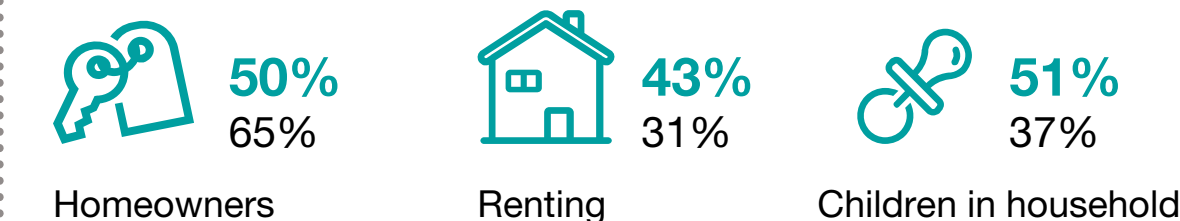
Shopping behaviours

Regularly use home delivery for food or non-food shopping

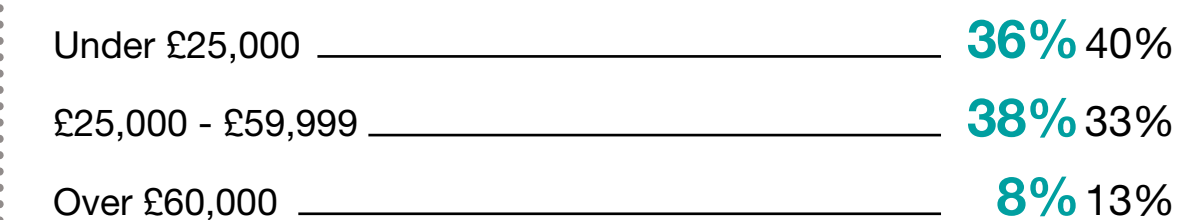


Household & financials

Household



Household finances

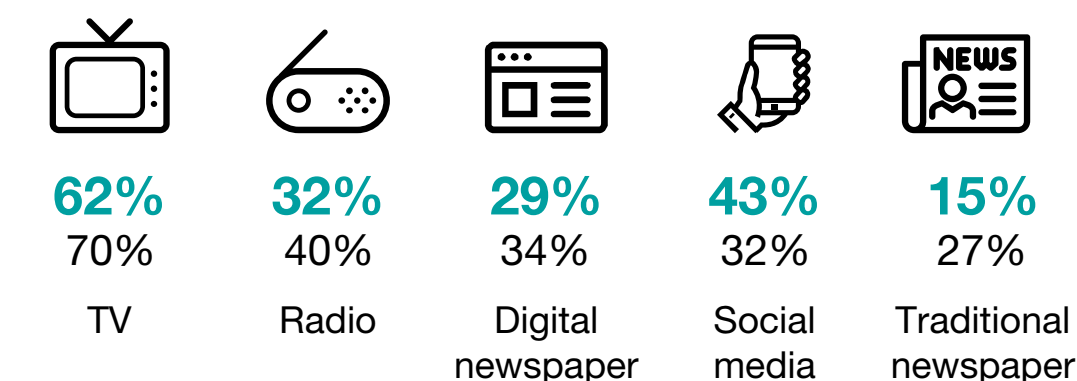


Technology & media

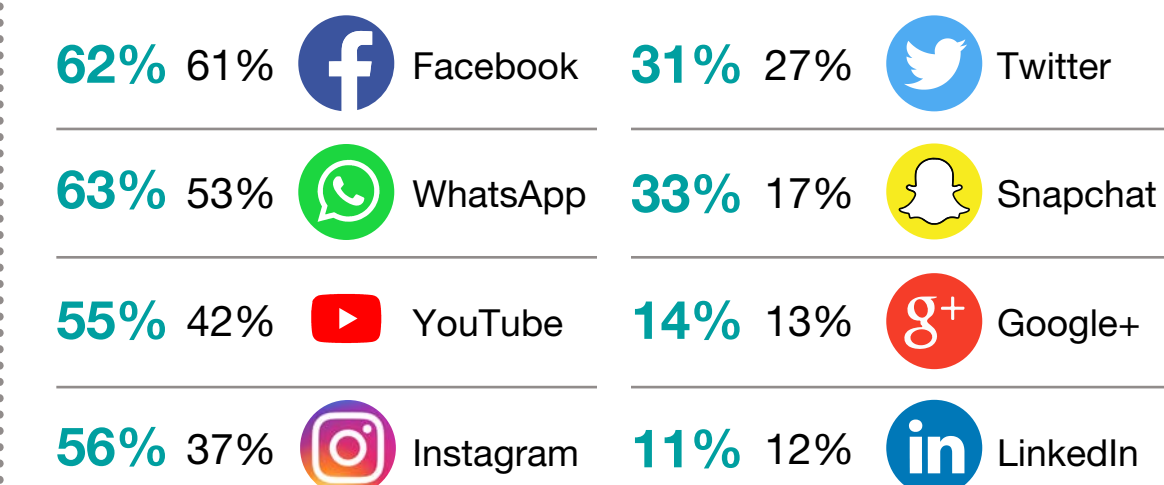
Use of smartphones



Consumption of news



Social media

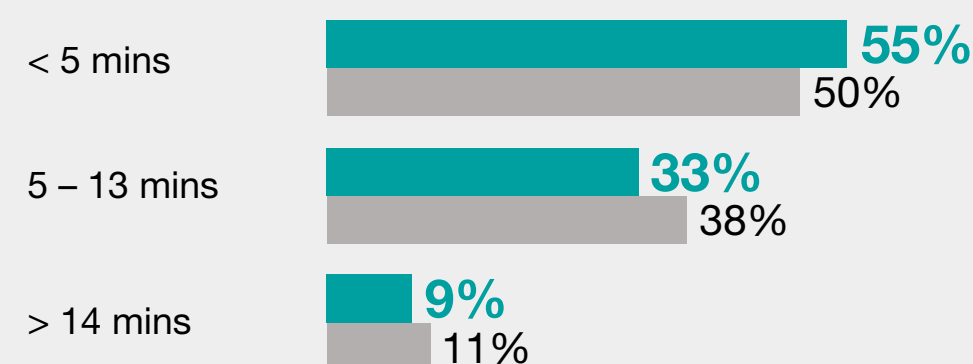


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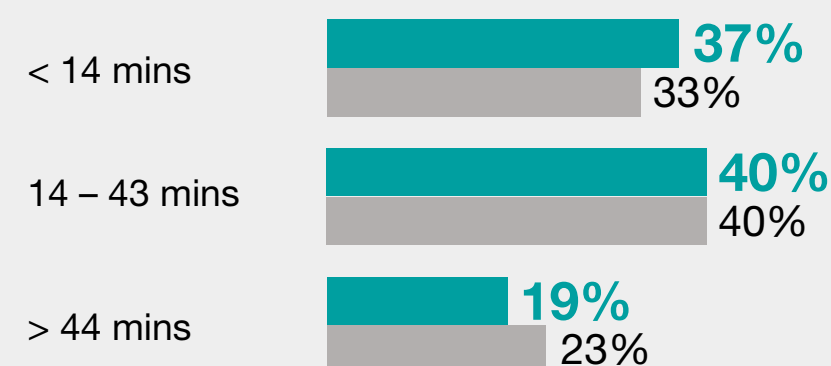
■ Segment 2 ■ All segments

Access to transport

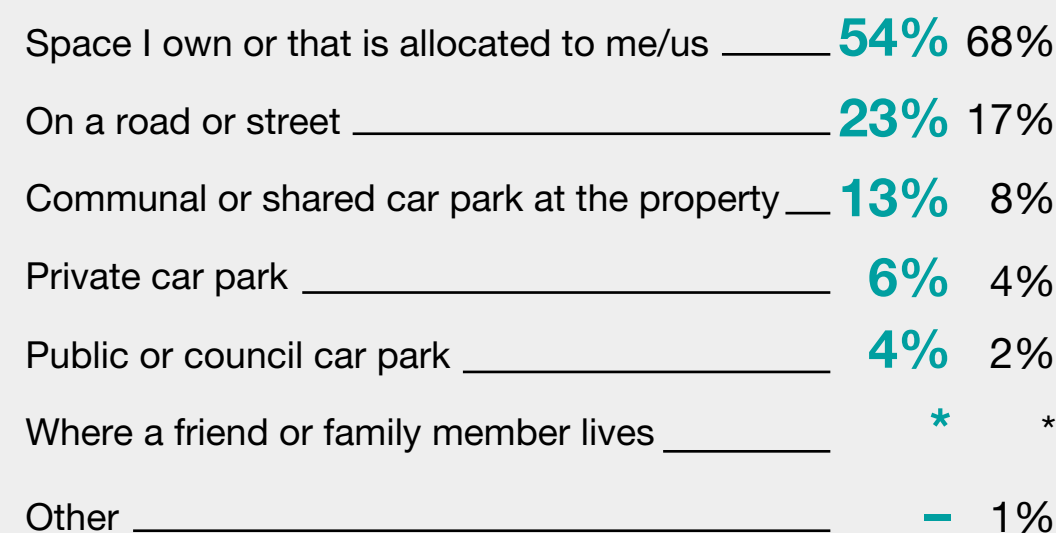
Distance to nearest bus stop (mins walk)



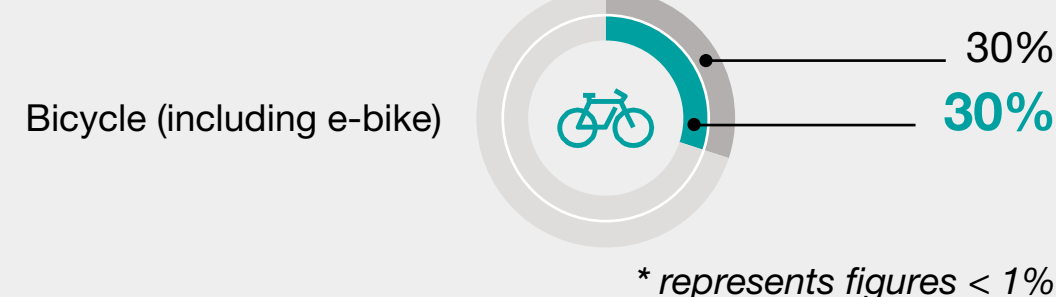
Distance to nearest railway station (mins walk)



Parking their vehicles

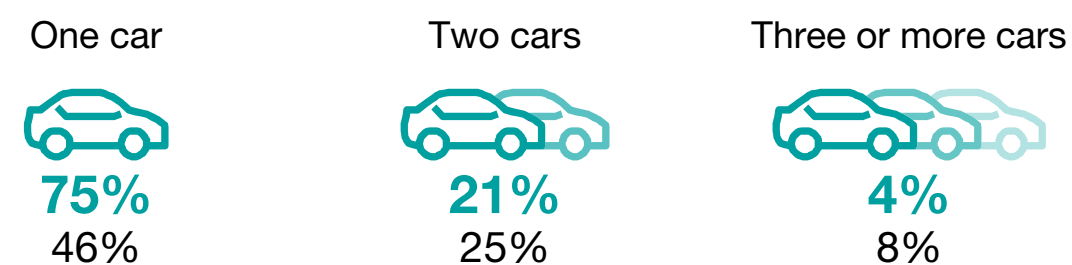


Access to:

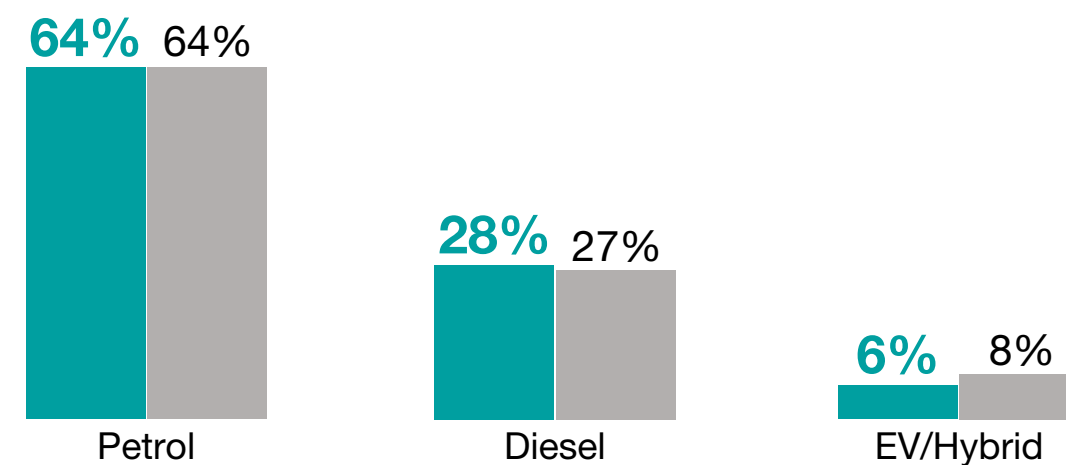


People in this segment are car owners and driving is their preferred way of travel. They use public transport modes, but believe services can be less regular, unreliable and expensive. They walk to bus stops/train stations, for leisure, or with their pets. Cycling is used for short journeys or for leisure, however, past negative experiences (such as theft) can negatively impact attitudes to cycling.

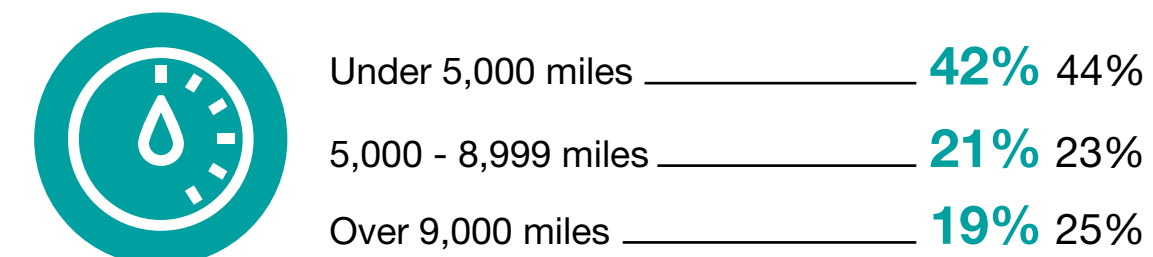
Number of cars in household



Car type



Number of miles driven per year

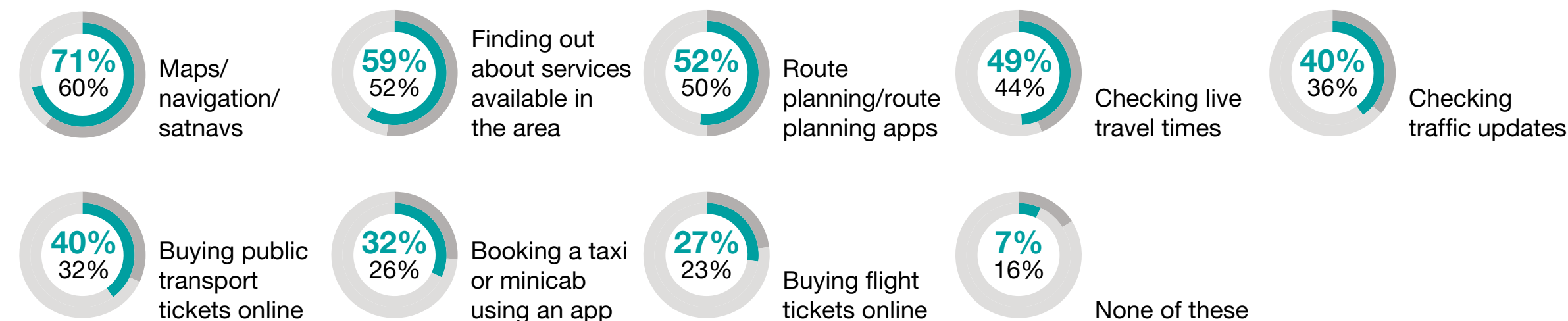


Strategic Road Network usage (Motorways and A-roads)



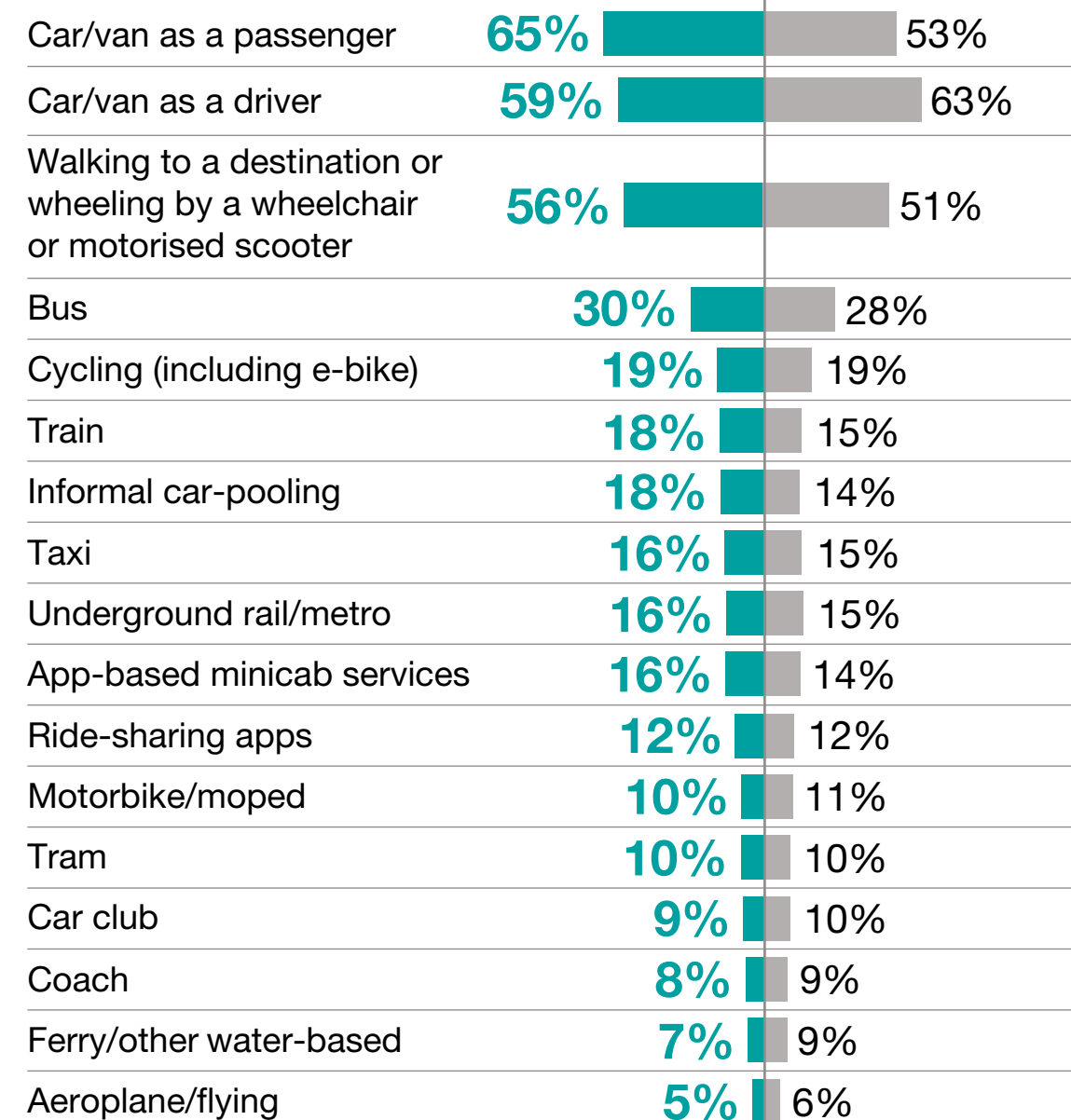
Understanding transport choices

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




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■ Segment 2 ■ All segments

Aside from working from home more and commuting less, the COVID-19 pandemic seems to have had a minimal impact on transport behaviours for people in this segment. Instead, they reported modal changes as a result of different life events – for example, moving house or getting a driving licence. In both instances, there was an increase in driving, to the detriment of using other transport modes such as app-based minicab services, trains and/or walking. Reflecting on the recent increase in prices, there is a perception that taxis/app-based minicab services and public transport modes are more expensive compared with driving a personal car.

People in this segment are concerned about the cost of living situation. They are making more considered choices about their journeys, although these are balanced against convenience – e.g. shorter journeys – and being comfortable and having reduced stress levels when travelling. Working from home patterns provide the opportunity to make fewer journeys and save money on transport.

 **43%** 51% | Happy about lifestyle and contribution to climate change

 **45%** 37% | Would like to do a bit more to reduce my impact

 **9%** 9% | Would like to do a lot more to reduce my impact

Enablers and barriers to different transport modes

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Attitudes towards transport and climate

Cost of living, politics and housing are top concerns for people in this segment. They are less concerned about environmental issues but acknowledge the environmental benefits of active travel modes and public transport modes.

Making public transport, and in particular train services, more affordable was an important objective for people in this segment. There is a feeling that some public transport modes are more accessible to those faring better financially.



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