

Heavy Car Users, Frequent Flyers

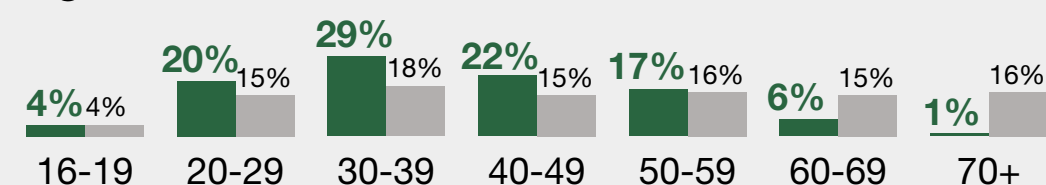
■ Segment 6 ■ All segments

Who are they?

Gender

Male **♂52%** 49% Female **♀47%** 51%

Age



Mobility difficulties impacting travel

8% 25%

Ethnicity

88% 88% White **11%** 11% Ethnic Minority

Household finances

Under £25,000 **14%** 40%
£25,000 - £59,999 **41%** 33%
Over £60,000 **31%** 13%

People in this segment are aged between 30 and 50, in employment, and live with their family (partner and children) in suburban or rural areas.

They are likely to own 2-3 cars, and this is their main mode of transport. Occasionally, they will make use of public transport and active travel modes.

People in this segment are likely to have flexible and hybrid working patterns. They use the car to commute to work because this is seen as a convenient and cheaper way to travel, particularly when travelling longer distances. They are likely to live with a partner and children, so part of their daily travel will also involve taking children to school, sport activities, appointments or travelling somewhere as a family. Driving is also an enjoyable way to travel. They will make use of public transport for longer work journeys, although some perceive it to be time consuming and unreliable.

Oliver



- **Age:** 42
- **Lives:** Ide Hill, Sevenoaks, Kent
- **Household composition:** Married, living with wife and three children
- **Employment:** Full time Finance Director, works 1-2 days per week at home
- **Disability/Health:** No
- **Tenure:** Homeowner, with mortgage
- **Interests and concerns:** Likes motorsport and classic cars; worries about housing, the cost of living pressures (particularly for his children), and the future of Britain



Enablers and barriers to different transport modes

Car

- ✓ Convenience
- ✓ Saving time
- ✓ Ability to carry items/luggage
- ✓ Enjoyable way of travelling
- ✓ Sense of control over the journey and its duration
- ✓ Lack of reliable public transport services
- ✓ Cheaper than public transport (particularly when travelling with family)
- ✗ Cost of fuel
- ✗ Parking availability and cost
- ✗ Roadworks

Walking

- ✓ Positive attitudes towards the environment
- ✓ Health benefits – recreational and keeping fit/exercising
- ✓ Lifestyle/preference for walking
- ✓ Suitable for short-distance journeys in the local area/to bus stops or train stations
- ✓ Feeling of control over the journey length and duration
- ✗ Convenience/saving time
- ✗ Perceived as suitable for shorter journeys locally
- ✗ Poor weather

Cycling

- ✓ Positive attitudes towards the environment
- ✓ Good infrastructure
- ✓ Leisure/holiday family activity
- ✓ Life habits/personal preference
- ✗ Lack of infrastructure
- ✗ Safety concerns
- ✗ Availability of more convenient travel modes – car and/or public transport
- ✗ Perceived as not suitable for longer (work) journeys

Public Transport

- ✓ An enjoyable way to travel (nice activity with children, and/or opportunity to relax/work)
- ✓ A good opportunity to use as part of a longer/multi-stage journey
- ✓ Bus stops/train stations in close proximity
- ✓ No need for parking services
- ✓ Can be a cheaper alternative to car journeys
- ✓ Positive attitudes towards the environment
- ✓ Good infrastructure
- ✗ Can be unreliable
- ✗ Leisure/holiday family activity
- ✗ Life habits/personal preference

General transport habits

- **Two older children walk to the local high school, with the youngest taken by car to primary school** which is a 10 minute drive.
- **Three cars in the household** – one for Oli’s daily use, one for his wife, and another for Oli’s oldest kid who has recently passed his driving test.
- **Walks to local shop when only grabbing “bits and pieces”**, otherwise the family gets groceries delivered.
- **Goes on holiday two to three times per year, they usually drive to the airport** – typically Gatwick or Stansted – and leave the car in the long-stay car park.



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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General transport habits

Oli, his wife, and their three children live in a five bedroom house in Sevenoaks. The two older children walk or get the bus to their schools, and Oli's wife does the daily school run for their youngest.

There are three cars in the household – one for Oli's daily use, one for his wife, and another for their oldest child who has recently passed his driving

test. Usually, Oli walks to the local supermarket when only grabbing "bits and pieces", otherwise the family gets groceries delivered.

For the 3-4 times a year the family goes on holiday, they typically fly overseas. They usually drive to the airport – most likely Gatwick or Stansted – and leave the car in the long-stay car park.



Frequent journey

Driving to his office in Maidstone, 3-4 times a week.

- ✓ Enjoys the 45-60 minutes between home and office to just drive and relax
- ✓ Once or twice a week, he'll pick up a colleague on the way in order to reduce their mutual car use and be more environmentally-friendly
- ✗ Sometimes hits heavy traffic and his satnav could be better at offering alternative routes

"I had a longer journey today. Starting from home, I picked up a colleague near Tunbridge Wells, then headed on to Maidstone. Then did the same in reverse. I would say this sort of journey happens at least a couple of times a week."



Less frequent journey

Taking one of the cars for an MOT, 2-3 times a year.

- ✓ Should be a relatively short journey – garage only 15 miles away
- ✗ Frequent roadworks double the journey time and no alternative route as live in relatively rural area
- ✗ Can waste a day's work if roadworks combine with garage not having a courtesy car available to drive home – poor WiFi at the garage so can't work remotely from there

"I didn't really want to spend all day at the garage. I mean, yes, I could've taken my laptop. I could've probably dialled into his Wi-fi and worked but there was no point really."



Opportunities for Change

Key factors in decision making:

- **Enjoyment** - likes driving cars
- **Convenience** - work vs leisure, distance covered, family present or not

Buying an electric vehicle:

- ✓ Recently had an electric charging point installed at home
- ✓ Kids and wife want to get an EV in order to be more green
- ✗ He's been reluctant in the past but has started to reconsider
- ✗ Would like to know more about functionality first

"If they were a bit more flexible, you know, to families travelling during the peak hour. We have a reasonably good train network and could reach most destinations, It just purely comes down to cost, to be honest."

Using public transport more frequently:

- ✓ Likes to get the train on a family trip as it's less stressful
- ✓ Used to get buses locally as kids enjoyed sitting on top deck
- ✗ Less so now as they are getting a bit older
- ✗ Too expensive to travel as a family by train

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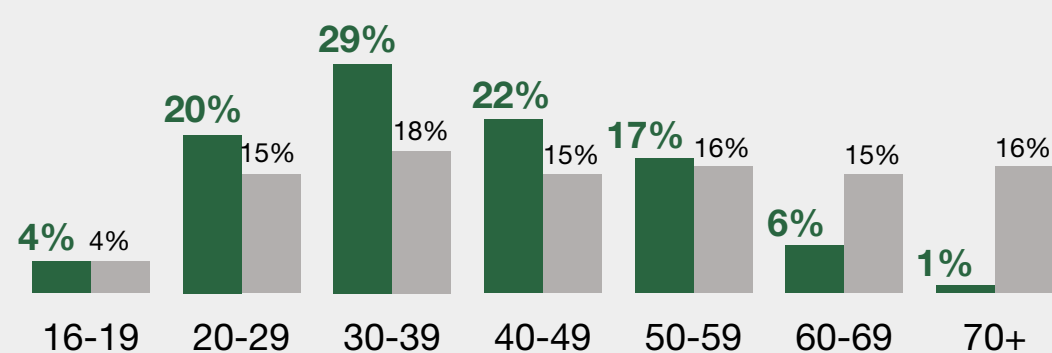
■ Segment 6 ■ All segments

Who are they?

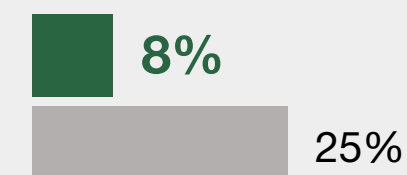
Gender

Male **♂52%** 49% Female **♀47%** 51%

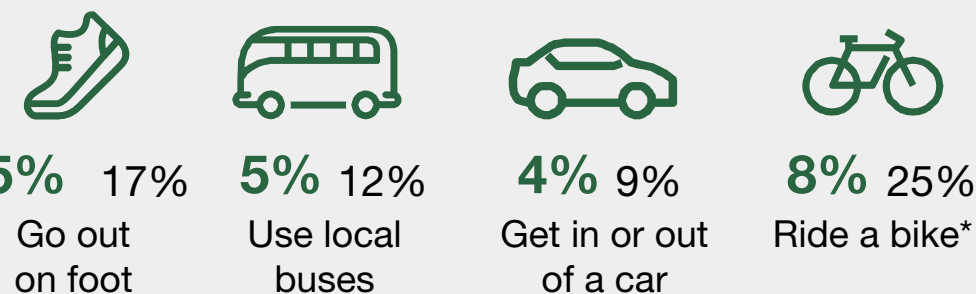
Age



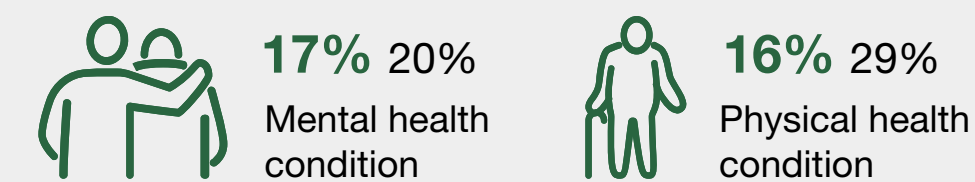
Mobility difficulties impacting travel



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



Mental health/physical health condition:

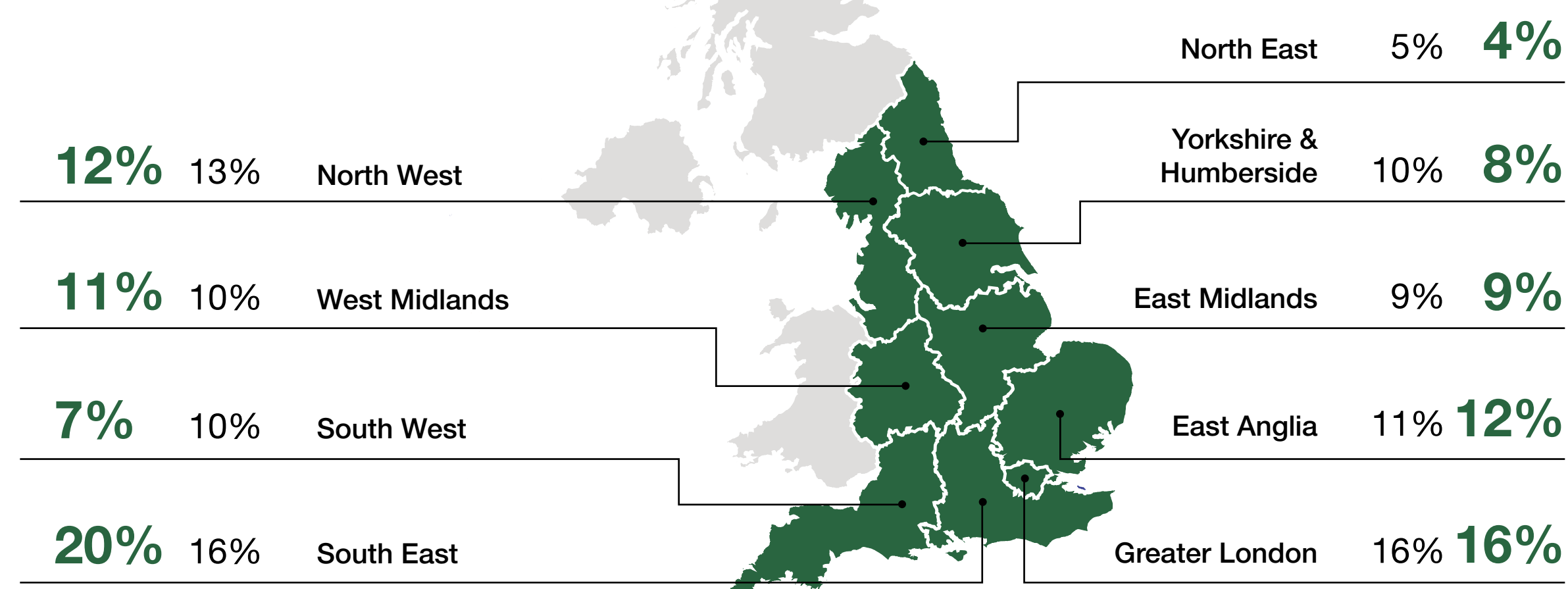


Ethnicity

88% 88% White 11% 11% Ethnic Minority

Location

Urban **72%** 78% Rural **19%** 14%



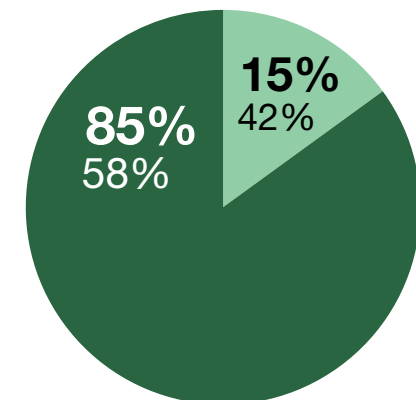
Employment & working patterns

Working

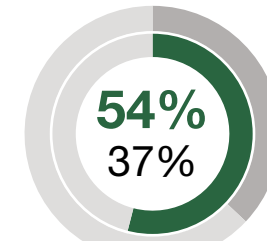
63% 39% Full-time employed
15% 14% Part-time employed
7% 6% Self employed

Not working

5% 5% Student/Pupil
4% 23% Retired
4% 10% Unemployed
2% 5% Parent-homemaker

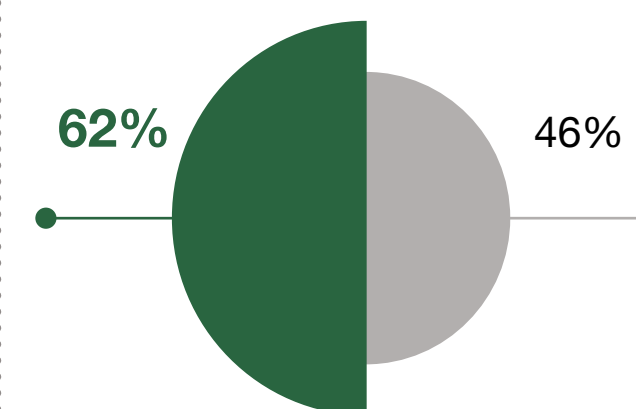


85% 58% Travel to a place of work at least once a week



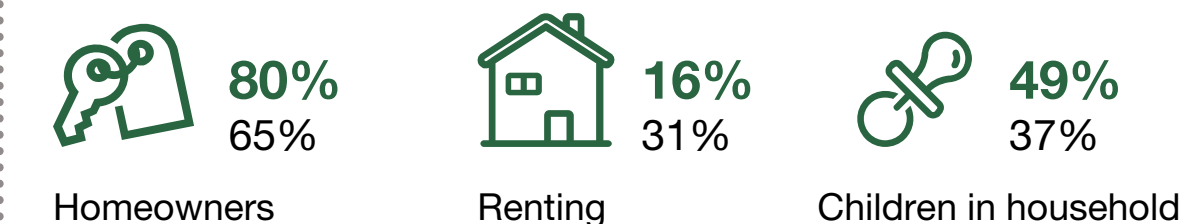
Shopping behaviours

Regularly use home delivery for food or non-food shopping

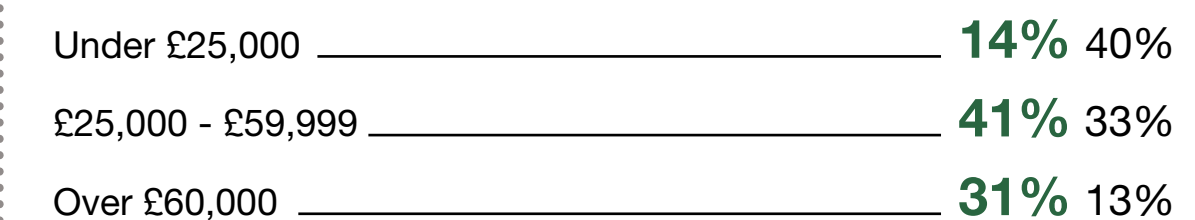


Household & financials

Household



Household finances

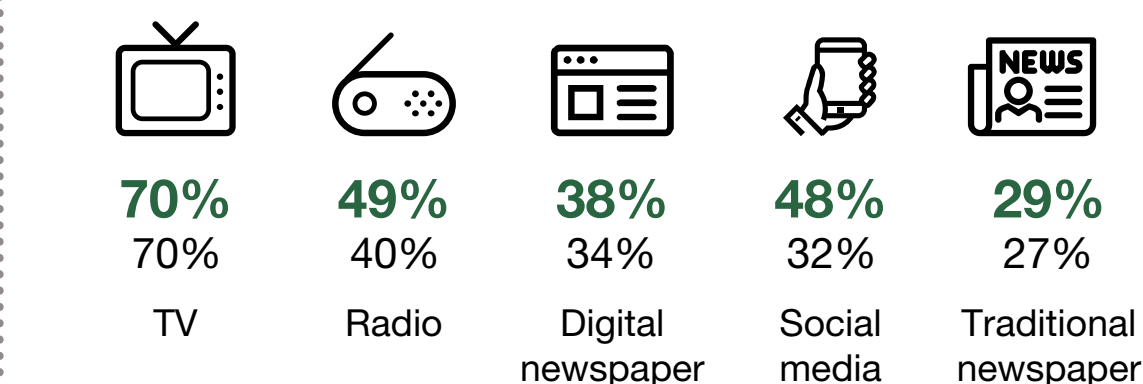


Technology & media

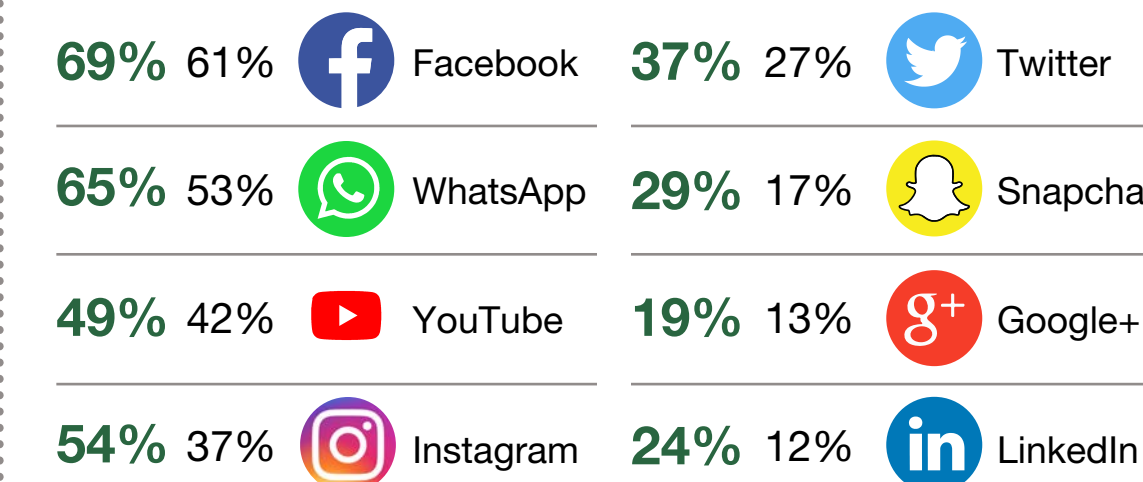
Use of smartphones



Consumption of news



Social media



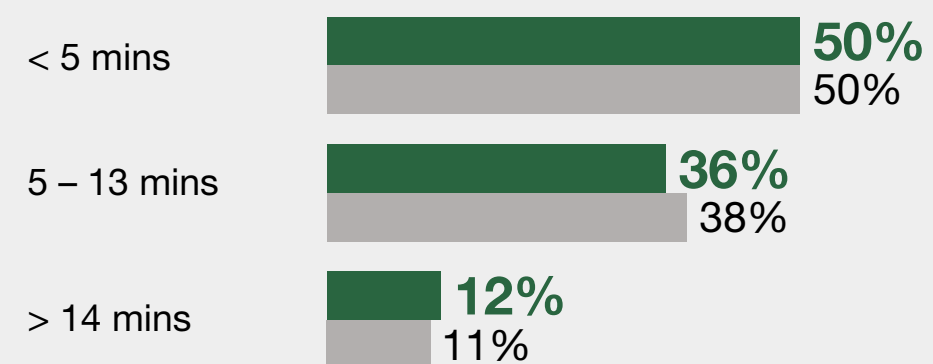
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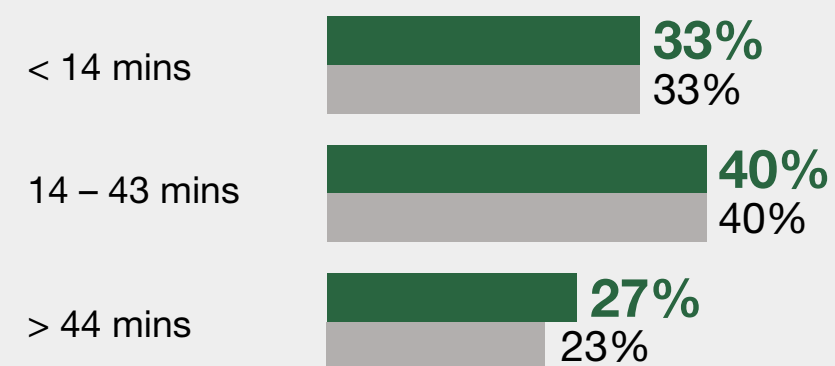
■ Segment 6 ■ All segments

Access to transport

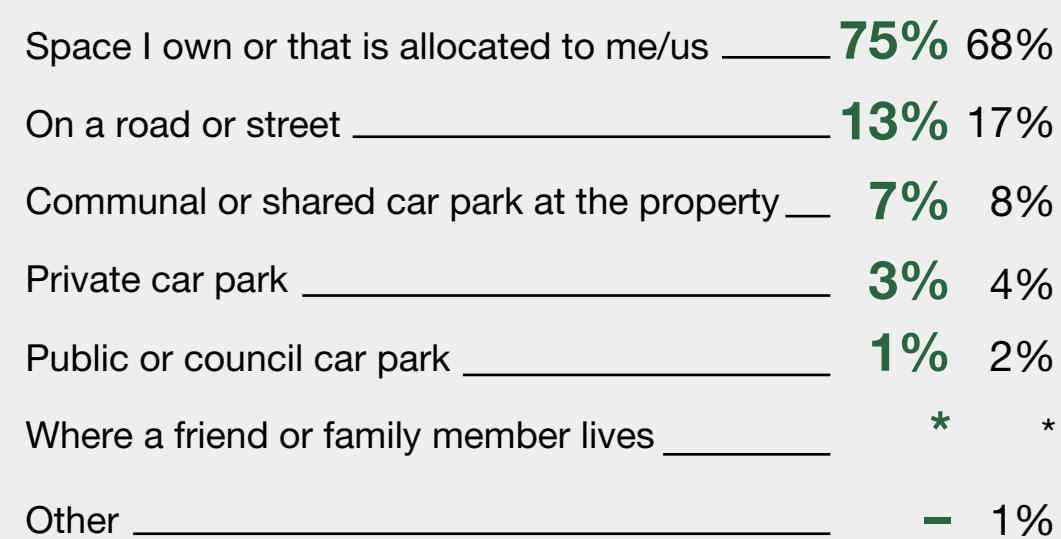
Distance to nearest bus stop (mins walk)



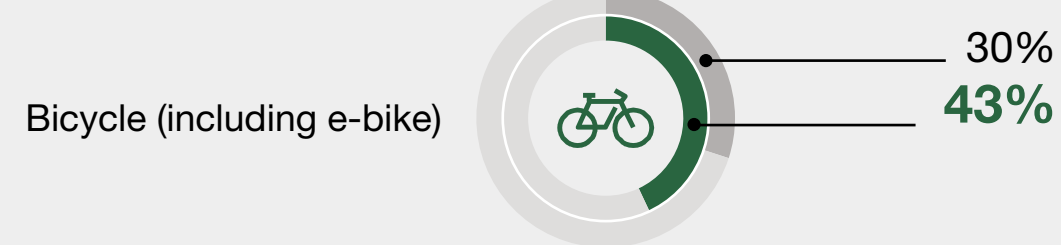
Distance to nearest railway station (mins walk)



Parking their vehicles



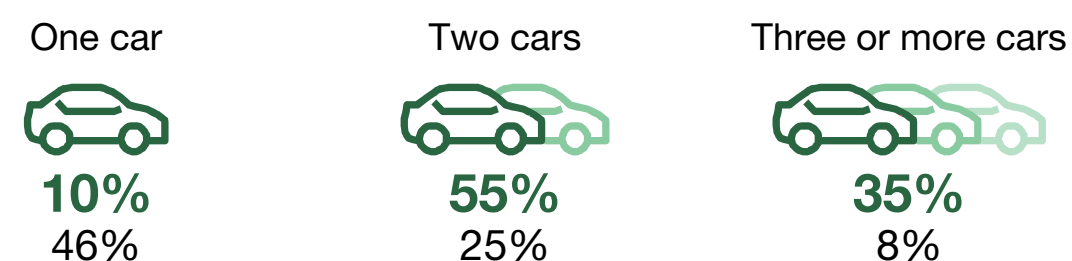
Access to:



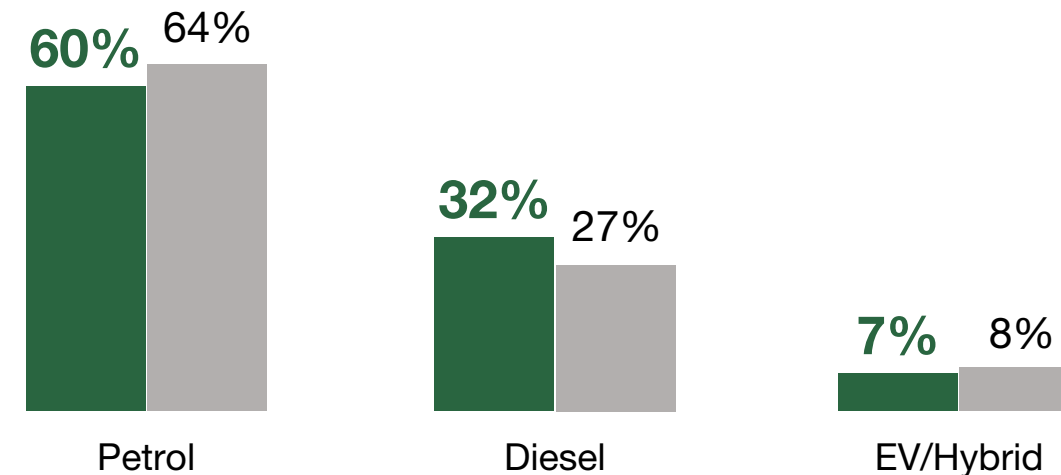
* represents figures < 1%

People in this segment own 2-3 cars, and this is their main mode of transport. They enjoy driving and feel it is a convenient way to commute to work. Part of their frequent journeys will also be about taking children to school, sport activities, dentist/doctor appointments or travelling somewhere as a family.

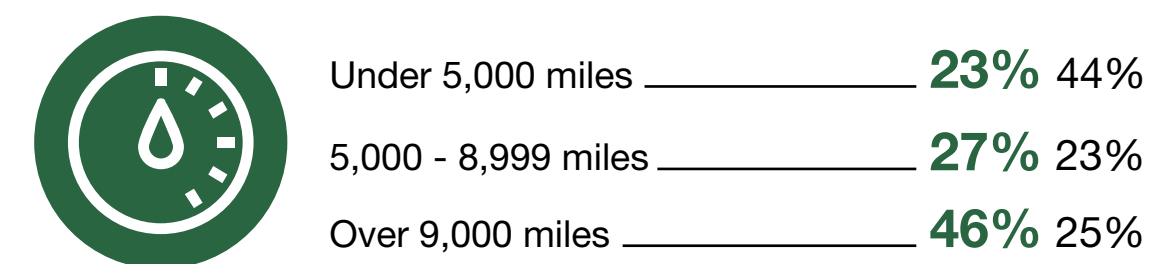
Number of cars in household



Car type



Number of miles driven per year

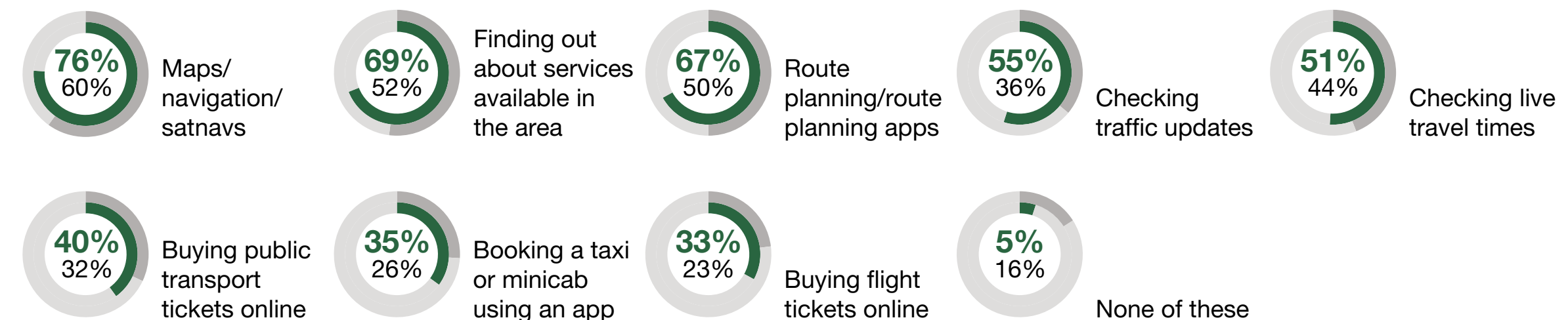


Strategic Road Network usage (Motorways and A-roads)



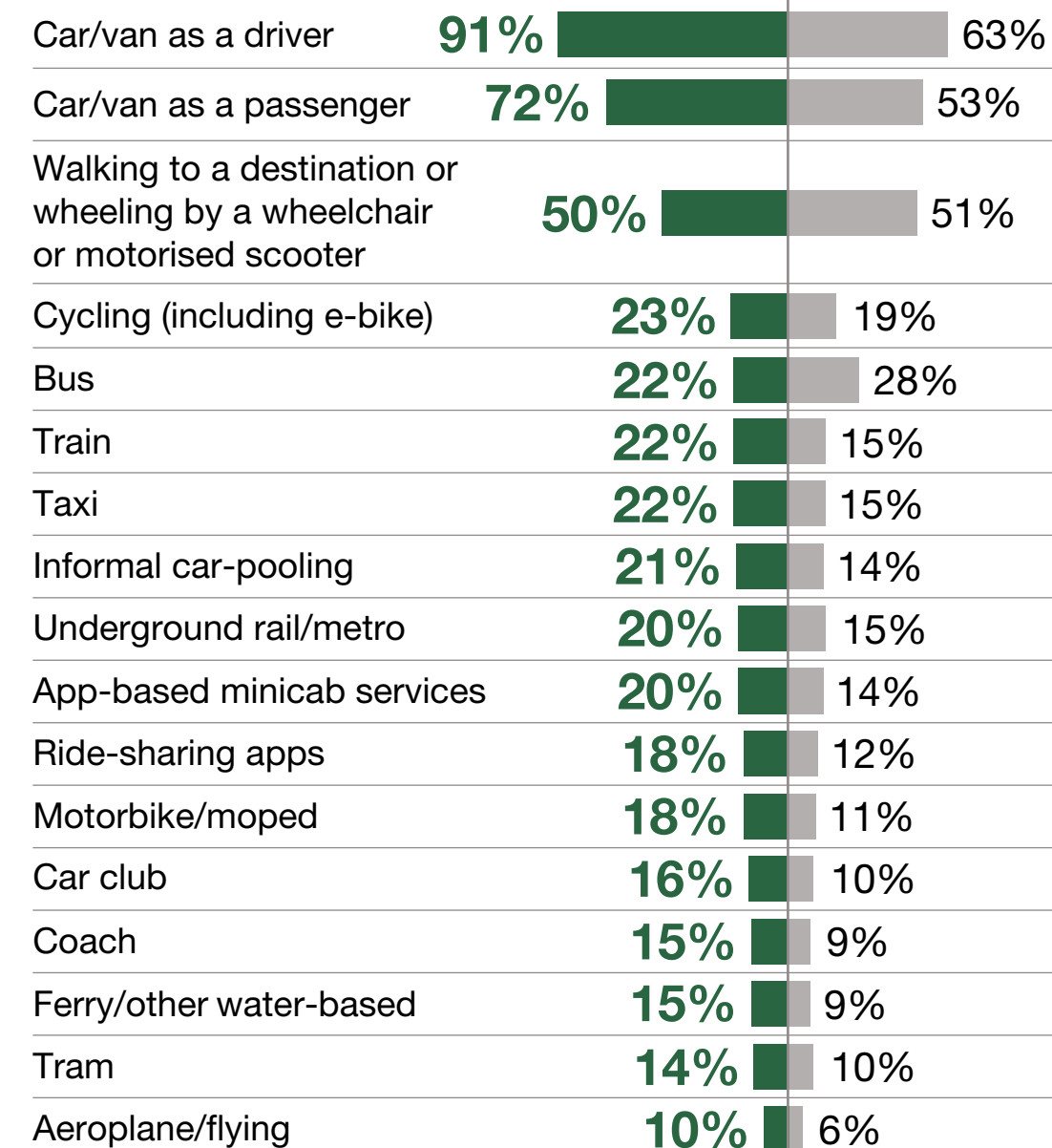
Understanding transport choices

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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People in this segment did not report any substantial changes to their use of transport modes in recent years. However, there was a sense that lifestyle changes – e.g. changes in employment, children growing up – could potentially influence future transport choices.

Some people in this segment reported trying to make less use of their car, due to a rise in fuel prices. They also look for cheaper train fares as an alternative to driving longer distances and will book in advance to save money. They are also more conscious about not wasting food and being more economical in general, spending money only on things that are necessary for the family's needs. They do most of their shopping online, including clothing, as the delivery fee is cheaper than the cost of fuel and parking.

Enablers and barriers to different transport modes

Car

- ✓ Convenience
- ✓ Saving time
- ✓ Ability to carry items/ luggage
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- ⊗ Cost of fuel
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Walking

- ✓ Positive attitudes towards the environment
- ✓ Health benefits – recreational and keeping fit/ exercising
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Cycling

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- ⊗ Leisure/holiday family activity
- ⊗ Life habits/personal preference

Attitudes towards transport and climate

People in this segment expressed some concern about the environment but transport choices were always based on what is more practical and most suited to their travel needs. However, people in this segment are open to using more sustainable transport modes and having the appropriate infrastructure in place would encourage favourable attitudes towards greener transport choices. For example, installation of an electrical vehicle charge point could encourage people to buy an electrical vehicle in future.



"I do have an electric charging point at home but don't currently have an electric car. We park all cars on the driveway." (Male, 46, employed full-time, East Anglia)

48% 51% | Happy about lifestyle and contribution to climate change

43% 37% | Would like to do a bit more to reduce my impact

8% 9% | Would like to do a lot more to reduce my impact



"I think, you know, the more things get greener, the more electric cars, the more people wanting to offset their carbon footprint, etc, it might come into it, but again, I think it would always come down to convenience and whether or not that particular service is meeting my needs in terms of where I needed to be." (Male, 46, employed full-time, East Anglia)