

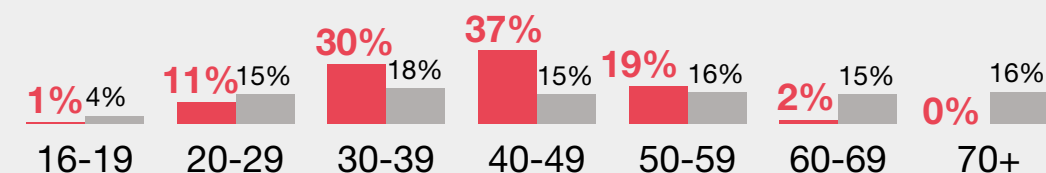
■ Segment 5 ■ All segments

Who are they?

Gender

Male **♂ 48%** 49% Female **♀ 52%** 51%

Age



Mobility difficulties impacting travel

6% 25%

Ethnicity

87% 88% White **11%** 11% Ethnic Minority

Household finances

Under £25,000 **19%** 40%
 £25,000 - £59,999 **38%** 33%
 Over £60,000 **30%** 13%

People in this segment are in their 30s and 40s, have a university degree and live with their partners and children in households in urban and suburban areas.

They are car owners and make use of a mix of transport modes including public transport and active travel. People in this segment describe having flexible working patterns, with some working from home 5 days a week. When they commute to work, they are likely to drive (particularly in rural areas) or use public transport. The car is seen as a convenient way to travel, especially with children in the household, and people also describe using this mode for leisure trips. They make use of public transport modes, although in some cases, these modes are seen as more expensive when travelling as a family, especially train services. They prefer walking in the local area and will go out on bike rides with the children.

Nigel



- **Age:** 44
- **Lives:** Harrogate, Yorkshire
- **Household composition:** Lives with his husband and young daughter
- **Employment:** Full time Marketing Consultant, works 2 days per week at home
- **Disability/Health:** No
- **Tenure:** Homeowner, with mortgage
- **Interests and concerns:** Likes watching sport; worries about inflation and global instability



Enablers and barriers to different transport modes

Car

- ✓ Convenience/saving time
- ✓ Lack of reliable public transport services
- ✓ Cheaper than other modes of transport (particularly when travelling as a family)
- ✗ Positive attitudes towards the environment
- ✗ Cost of fuel
- ✗ Active lifestyles / positive attitudes to active travel modes
- ✗ Parking availability

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
- ✓ Saving money
- ✗ Convenience/saving time
- ✗ Journeys with multiple stops along the way (school drop-off/pick-up, work, shopping)
- ✗ Not suitable for longer journeys
- ✗ Poor weather

Cycling

- ✓ Positive attitudes towards the environment
- ✓ Life habits/personal preference
- ✓ Good weather
- ✓ Leisure/outdoor family activity
- ✗ Personal preference/lifestyle
- ✗ Lack of infrastructure
- ✗ Local relief (hilly areas require more effort when cycling)
- ✗ Availability for more convenient travel modes – car and/or public transport
- ✗ Preference for walking/other ways of exercising and keeping fit

Public Transport

- ✓ Positive attitudes towards the environment
- ✓ An enjoyable way to travel
- ✓ No need for parking services
- ✓ Frequent and reliable services
- ✓ Bus stops/train stations in close proximity
- ✓ Feeling of safety while using public transport services
- ✗ Availability of services
- ✗ Poor connections
- ✗ Convenience provided by alternative transport modes (car), particularly when travelling with children
- ✗ Cost (particularly trains)

General transport habits

- **Works full-time** as a Marketing consultant and typically spends **2 days a week working from home**. When commuting, he drives to his office in York.
- **His daughter goes to nursery 3 days a week** and either Nigel or his husband **will walk her there** if the weather is nice or drive if not.
- **Most of their grocery shopping is done online**, though there are plenty of local amenities if a top up is needed. Outside of the local neighbourhood, Nigel tends to drive wherever he is going. He would like to purchase an electric car in the future.



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

Nigel, his partner James and his three year old daughter live close to Harrogate in a semidetached house that they own. Nigel works from home two days a week, typically, with the remaining days spent commuting into York or visiting clients. James is studying for a Masters and his daughter is at nursery three days a week. Either Nigel or James

will walk her there if the weather is nice or drive if not. Most of their grocery shopping is done online, though there are plenty of local amenities if a top up is needed. Outside of the local neighbourhood, Nigel tends to drive wherever he is going.

Frequent journey

Commuting to work in York, 2-3 times a week.

- ✓ Increasingly Nigel's preferred option due to concerns about reliability of train services
- ✓ Getting to York is really easy by car; it's usually under an hour, if traffic is light
- ✗ But traffic can be unpredictable in mornings and evenings nowadays

"Travelling at this time in the morning is always difficult as you cannot judge what the traffic is going to be like on the motorway. On a good run it can take 45 minutes but has been known to take nearly 2 hours on a bad day."

Less frequent journey

Business trip via train, 2-3 times per month.

- ✓ Harrogate well-connected to Manchester by train
- ✓ Onward travel by bus once in Manchester works well
- ✓ Especially useful if Nigel is likely to be socialising after work
- ✗ Becoming less reliable – lots of cancelled services recently
- ✗ And also becoming less comfortable – trains feel much more crowded now, so less likely to get a seat

"I would love to have an electric version of what I currently drive. That would be fantastic. But I can't see any way that we could possibly afford it at the moment."

Opportunities for Change

Key factors in decision making:

- **Reliability - travelling for work requires being on time**
- **Reason for trip - leisure travel allows for more relaxed forms of transport**

Would like to get an electric vehicle:

- ✓ Concerned about environmental impact of using current car
- ✓ Feels that an EV would be cheaper to run than current vehicle
- ✗ Upfront cost of a new EV isn't affordable and is waiting for prices to come down

"[driving less in the last 3 years]...I wasn't consciously trying to change the way I travelled. It's just a product of circumstances and what works with our family life."

Would like to use the train more for leisure:

- ✓ Enjoyable and relaxing way to travel when services are reliable / not overcrowded
- ✗ Feels cheaper, quicker, and more reliable to drive to York, Manchester, or further afield if all three of them on a day trip
- ✗ "A bit of a faff" to get the train with a young child

Suburban Families

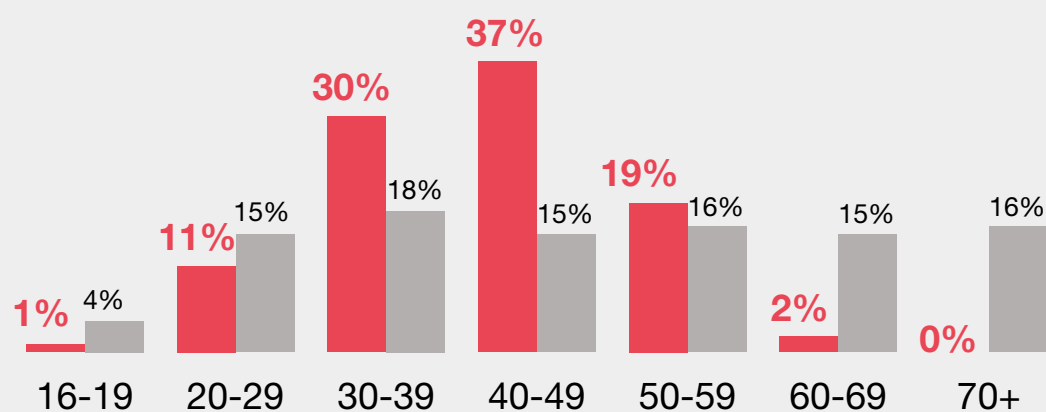
■ Segment 5 ■ All segments

Who are they?

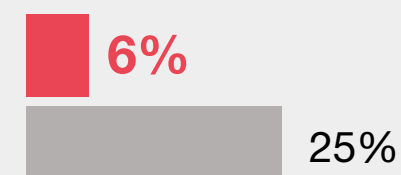
Gender

Male **♂48%** 49% Female **♀52%** 51%

Age



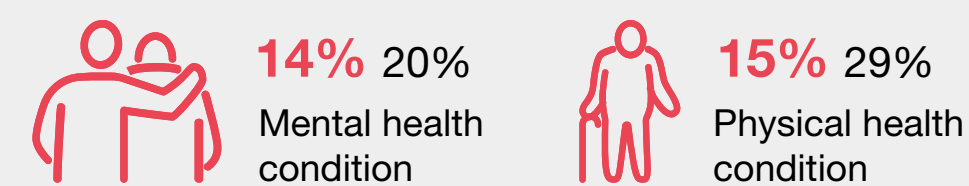
Mobility difficulties impacting travel



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



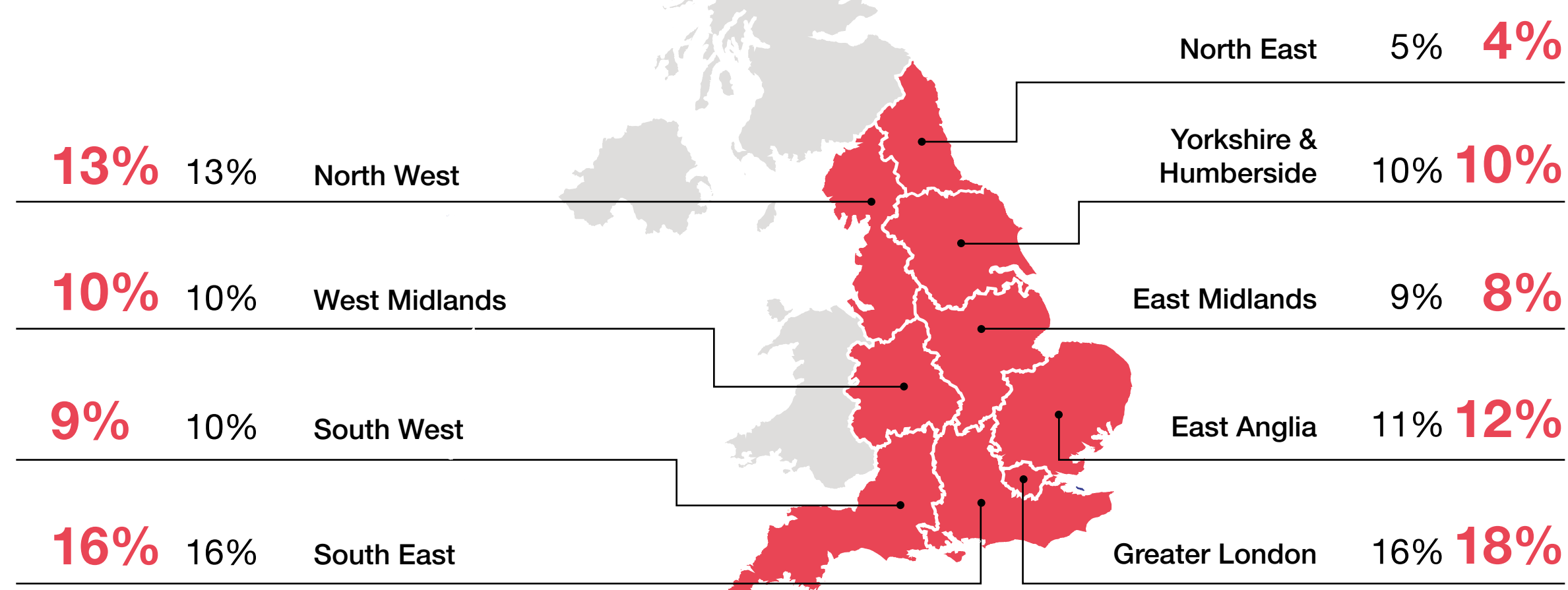
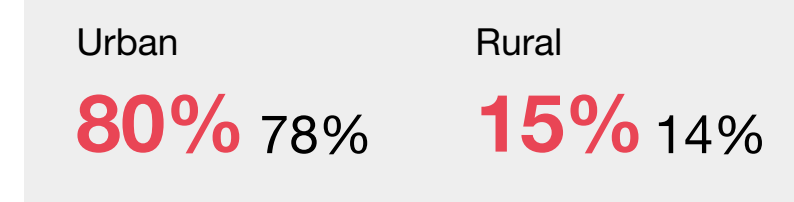
Mental health/physical health condition:



Ethnicity

87% 88% White 11% 11% Ethnic Minority

Location



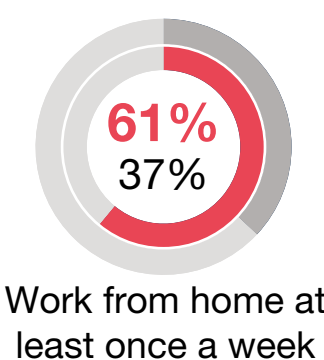
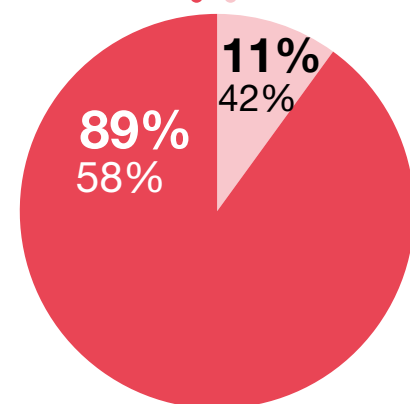
Employment & working patterns

Working

- 65% 39% Full-time employed
- 17% 14% Part-time employed
- 7% 6% Self employed

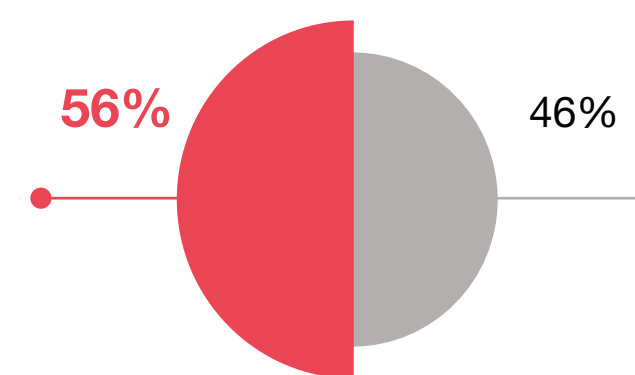
Not working

- 4% 5% Parent-homemaker
- 3% 10% Unemployed
- 3% 23% Retired
- 1% 5% Student/Pupil



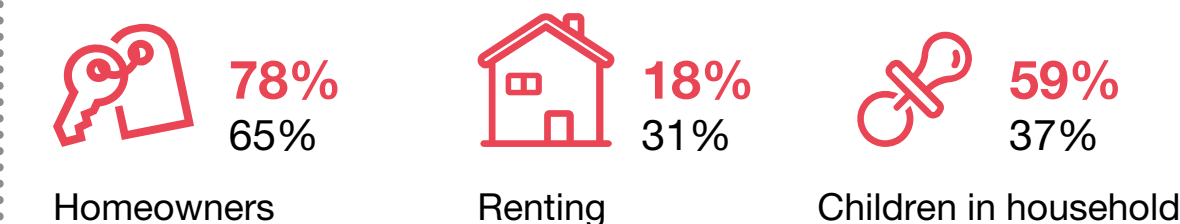
Shopping behaviours

Regularly use home delivery for food or non-food shopping

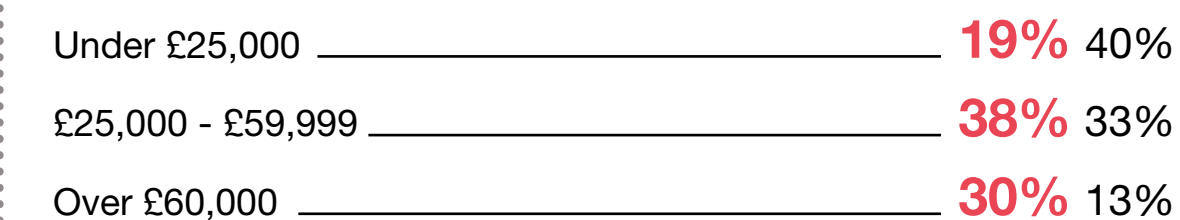


Household & financials

Household



Household finances

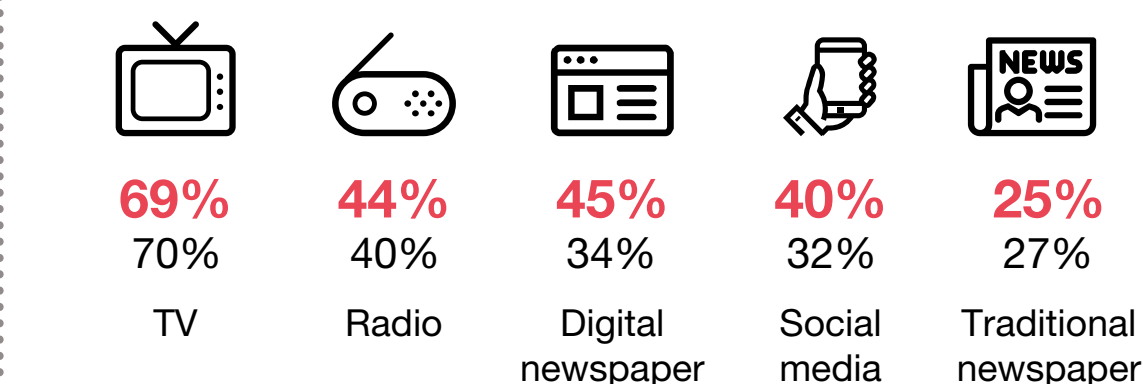


Technology & media

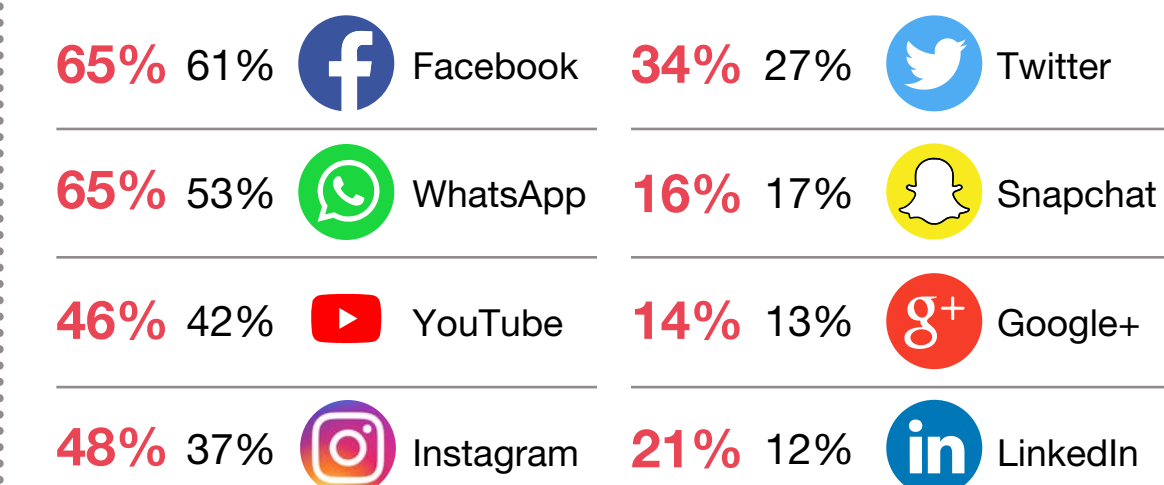
Use of smartphones



Consumption of news



Social media



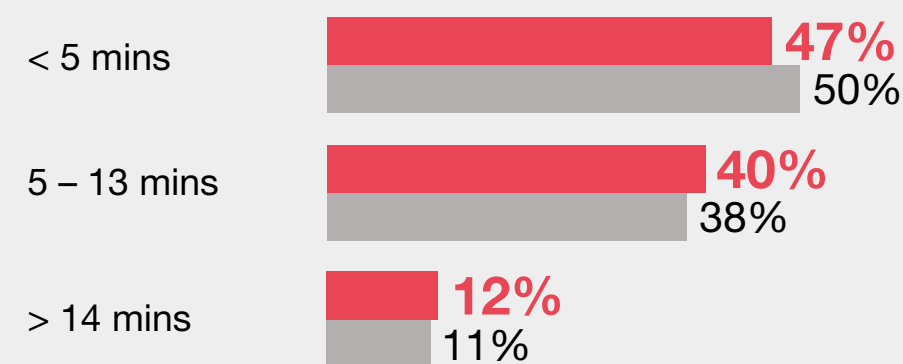
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Suburban Families

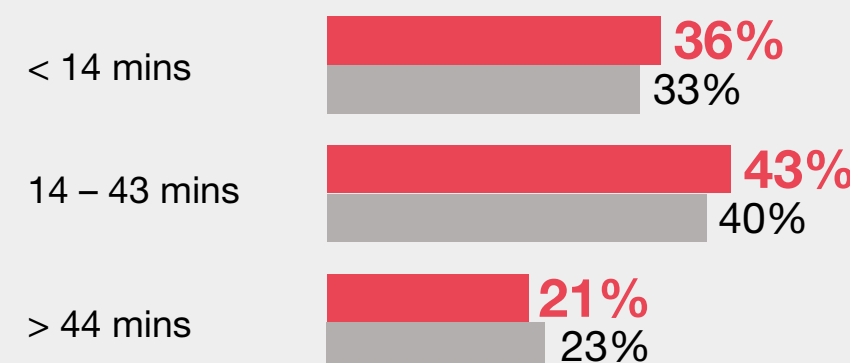
■ Segment 5 ■ All segments

Access to transport

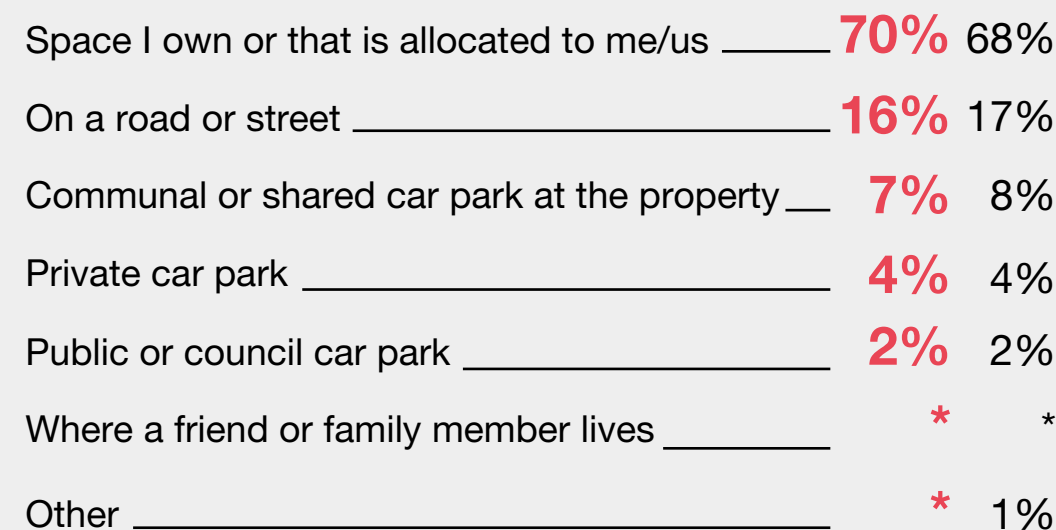
Distance to nearest bus stop (mins walk)



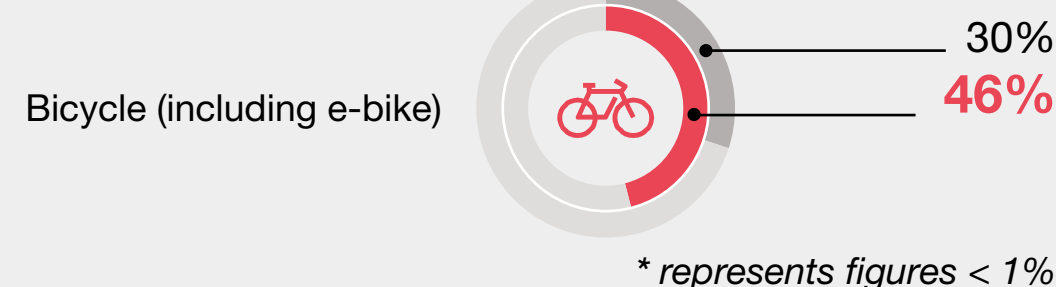
Distance to nearest railway station (mins walk)



Parking their vehicles

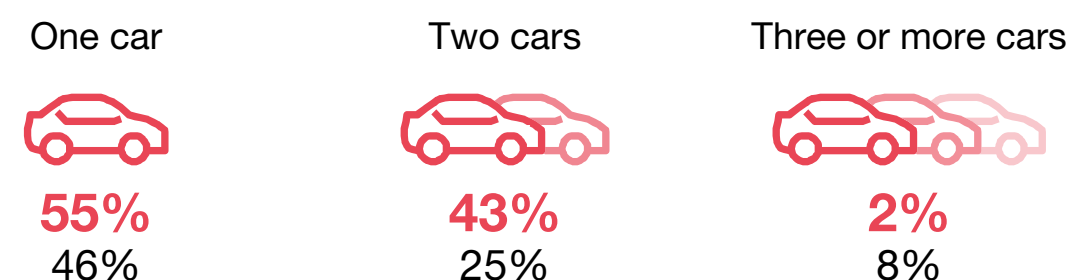


Access to:

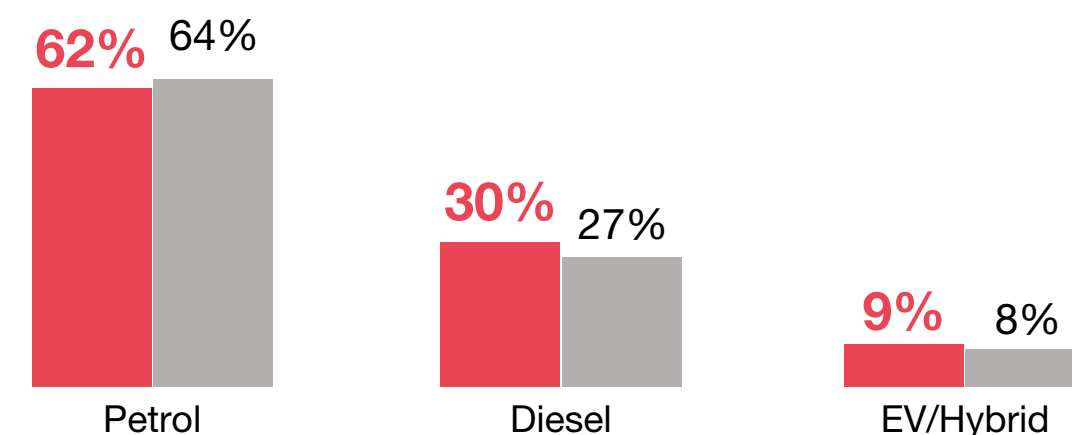


People in this segment have access to a range of transport modes. They are car owners and make use of the car as their main mode of transport. Those living in urban areas are likely to have a bus stop, train or underground/metro station in closer proximity to their home, while access to public transport can be patchy in rural areas. People in this segment also make use of active travel modes (walking and cycling).

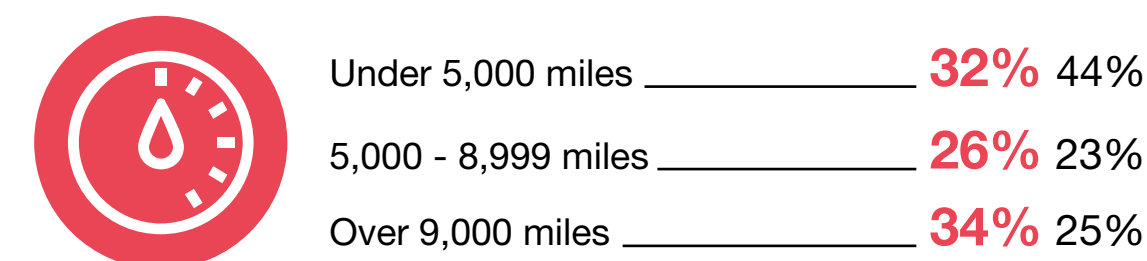
Number of cars in household



Car type



Number of miles driven per year

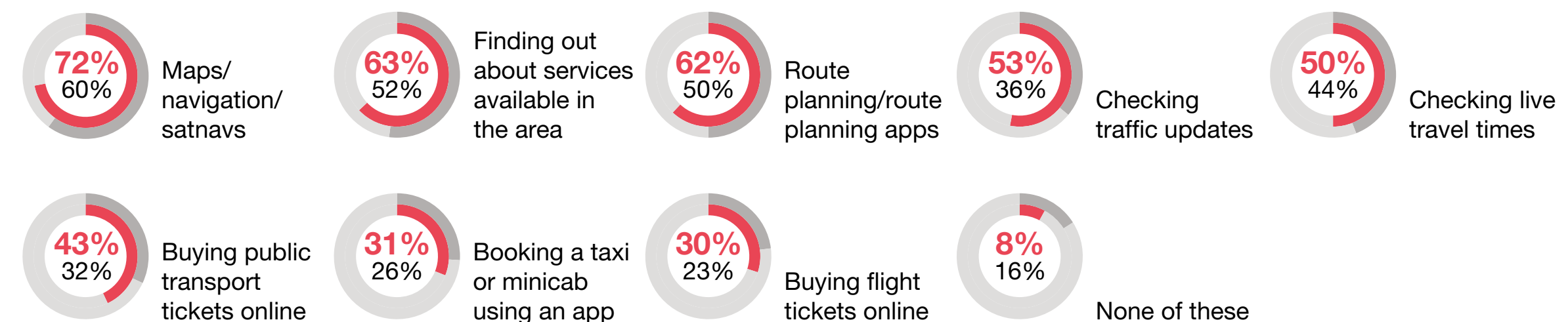


Strategic Road Network usage (Motorways and A-roads)



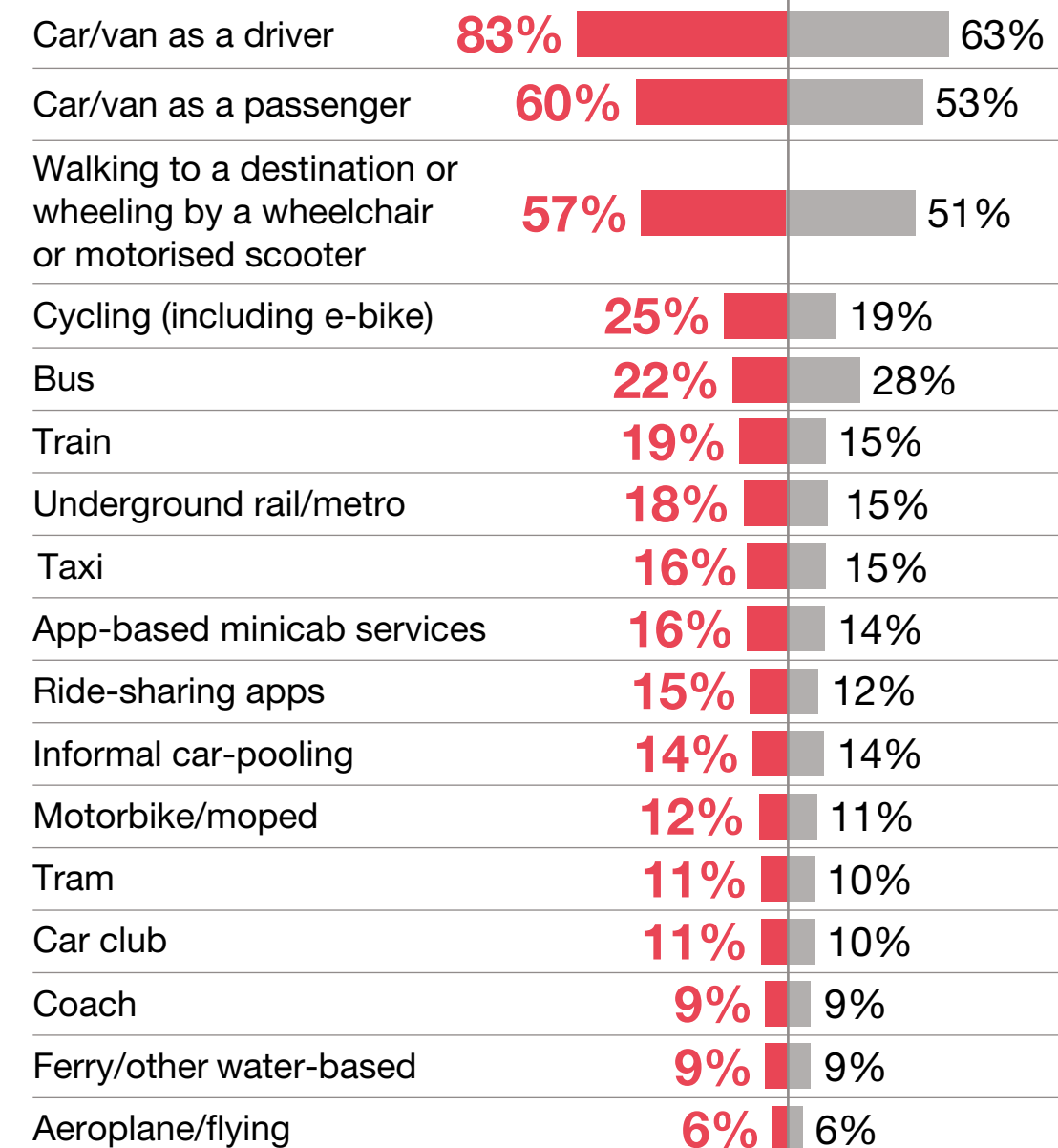
Understanding transport choices

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 5 ■ All segments


People in this segment have reduced their driving and use of public transport modes less as a result of increased work from home. In some cases, moving to a large city has facilitated a reliance on public transport. They have also reduced their travel abroad and have looked to holiday in places closer to home.

People in this segment reported being affected and making a few changes as a result of the cost-of-living pressures. They are giving up having a second car, making fewer journeys by car to save on fuel and looking for cheaper transport alternatives. They are also being careful with their energy usage, cancelling subscriptions and generally being more mindful about how they manage their finances.

“So, the obvious one is we got rid of the second vehicle and then we’re just paying attention to direct debits. I’ve cancelled a few subscriptions.” (Male, 39, rural, South West)

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

 **44%** 37% | Would like to do a bit more to reduce my impact

 **12%** 9% | Would like to do a lot more to reduce my impact

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Enablers and barriers to different transport modes

Car

- ✓ Convenience/saving time
- ✓ Lack of reliable public transport services
- ✓ Cheaper than other modes of transport (particularly when travelling as a family)
- ✗ Positive attitudes towards the environment
- ✗ Cost of fuel
- ✗ Active lifestyles/positive attitudes to active travel modes
- ✗ Parking availability

Walking

- ✓ Positive attitudes towards the environment
- ✓ Health benefits – recreational and keeping fit/exercising
- ✓ Lifestyle/preference for walking
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- ✗ Cost (particularly trains)



Attitudes towards transport and climate

People in this segment hold positive attitudes towards the environment and they actively try to make more use of environmentally friendly transport modes and less use of cars. The car is used mainly for journeys where it is cheaper, more convenient, and when public transport provision is poor. They enjoy walking for exercise and because of the positive benefits on the environment. They are interested in switching to an electric vehicle but feel that this is unaffordable at present.

Cycling is more sporadic and dependent on personal circumstances and convenience (i.e. location/area where they live).



“For environmental reasons really. Well, cost as well, but I believe that you should walk if you can, or use other forms of transport if you can.” (Female, 48, rural, West Midlands)