

# Urban Professionals Without Cars

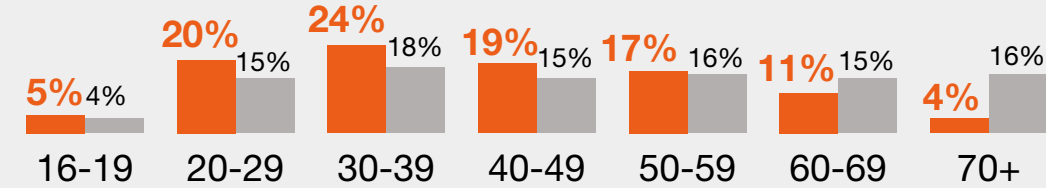
■ Segment 8 ■ All segments

## Who are they?

### Gender

Male **♂47%** 49% Female **♀52%** 51%

### Age



### Mobility difficulties impacting travel

**9%** 25%

### Ethnicity

**77%** 88% White **20%** 11% Ethnic Minority

### Household finances

Under £25,000 **48%** 40%  
 £25,000 - £59,999 **24%** 33%  
 Over £60,000 **7%** 13%

People in this segment are young urbanites who live near bus stops and/or train stations.

Choosing which transport mode to use is influenced by distance to destination, cost and, in the case of cycling, by weather conditions. Distance to the nearest bus stop/train station is less of a concern as this segment can easily access public transport.

Changes in employment (since the pandemic) are one of the main drivers of change in transport behaviour. Hybrid and flexible working arrangements mean commuting takes place 2-3 days per week.

People in this segment use active travel modes for a mix of commuting and leisure purposes.

## Rosa



- **Age:** 35
- **Lives:** Hendon, North London
- **Household composition:** Married, living with husband
- **Employment:** Works full time as a E-commerce Manager; hybrid and flexible working pattern - commutes 2-3 days/week, works from home 2-3 days/week
- **Disability/Health:** No
- **Tenure:** Tenant, private rent
- **Interests and concerns:** Environmentally conscious; worried about international conflict and rising prices at home
- **Driving licence:** Yes, full



## Enablers and barriers to different transport modes

### Car

- ✓ Flexibility/freedom
- ✓ For getting out of the city
- ✗ Traffic
- ✗ Lack of parking spaces

### Walking

- ✓ Short local journeys, up to 20 minutes
- ✓ Physical exercise
- ✓ Mental health
- ✗ Doesn't feel safe early in morning or late at night
- ✗ Poor weather

### Cycling

- ✓ Exercise
- ✓ Speed
- ✓ Environmentally friendly
- ✗ Lack of confidence in self, infrastructure, other road users
- ✗ Safety concerns
- ✗ Not for everyone – “it’s not particularly something that interests me”
- ✗ Poor weather

### Public Transport

- ✓ Environmentally friendly compared with car use
- ✓ Bus seen as more suitable for familiar routes
- ✓ Bus seen as affordable
- ✓ Train seen as more suitable for long journeys
- ✓ Train was perceived as faster
- ✓ An enjoyable way to travel
- ✗ Train fares seen as expensive
- ✗ Bus services seen as slow
- ✗ Unreliable services (delays, cancellations)
- ✗ Crowded services / lack of available seats
- ✗ Not well connected

## General transport habits

- **Rosa does lots of walking** – Hendon is very walkable for local amenities and to get to various public transport options.
- **Likes to walk some of the way home** from work for the exercise.
- **Commutes to work on the Tube** – it’s fast, convenient, and the station is only a 10-minute walk from home.
- The **one-hour commute** allows her **time to read**.
- **Has a driving licence but does not own a car.**
- She also uses the bus on occasions, but the Tube is more reliable in terms of timings.
- **Feels that she has no need for a car** – commuting is much cheaper than owning and running a car.
- **She would only consider getting an electric car** due to environmental reasons.
- **Use of public transport hasn’t really changed because of the pandemic.** Decided not to wear mask on public transport as soon as they were no longer mandatory.

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.

# Urban Professionals Without Cars



## Rosa

- **Age:** 35
- **Lives:** Hendon, North London
- **Household composition:** Married, living with husband
- **Employment:** Works full time as a E-commerce Manager; hybrid and flexible working pattern - commutes 2-3 days/ week, works from home 2-3 days/week
- **Disability/Health:** No
- **Tenure:** Tenant, private rent
- **Interests and concerns:** Environmentally conscious; worried about international conflict and rising prices at home
- **Driving licence:** Yes, full

### General transport habits

Rosa does lots of walking – Hendon is very walkable for local amenities such as shops, bars, and restaurants, and to get to various public transport options. Occasionally, Rosa likes to walk some of the way home from work for the exercise.

Rosa commutes to work on the Tube – it’s fast, convenient, and the station is only a 10-minute walk from her house. The one-hour commute allows her time to read. She also uses the bus on

occasions, but the Tube is more reliable in terms of timings. While Rosa has a driver’s license, she does not own a car. She feels that she has no need for one, living in London – it’s a conscious decision not to get a vehicle of her own, as she believes commuting is much cheaper than owning and running a car. She would only consider getting an electric car due to environmental reasons.

### Frequent journey

Commuting to and from work on the Tube 2-3 times a week.

- ✓ Reliable every day
- ✓ Within an hour door-to-door
- ✓ Time to read
- ✓ Easy to stay updated via apps and live in-journey information
- ✗ Can be very busy during rush hour

“As long as I get a seat and I can read my book, I’m fine.”

“Apps like Citymapper, or Google Maps also help me plan my trip. That means I’m not wasting time, and I can plan my day. I think that’s very helpful.”

### Less frequent journey

One-off train trip to a friends wedding.

- ✓ Easy to plan in advance
- ✓ Book ahead for a good deal
- ✓ Reliable services
- ✗ Expensive if booking at short notice
- ✗ Limited transport options when going to and from hotel and wedding venue

“It cost £70. I like that you can see the price beforehand, but it does feel slightly expensive.”

### Opportunities for Change

#### Key factors in decision making:

- **Familiarity** - prefers a route that she knows. Especially at night
- **Cost** - trying to save money, so cheaper options are preferred
- **Convenience** - reliability and somewhere to sit down are important, especially for commute to work

#### Would like to cycle more:

- ✓ Cost saving
- ✓ Freedom / flexibility
- ✓ Improved fitness
- ✓ Good for environment
- ✗ Bike could get stolen when chained up outside destination
- ✗ Infrastructure feels unsafe / proximity to other road users
- ✗ Pollution from other vehicles

“It’s only spoilt by cars speeding by and pollution levels. My journey would have been better if there were fewer cars on the road. I cycled it yesterday and it was a long cycle.”

#### Potential for switching to car use in the future:

- If moving to somewhere with fewer, less reliable public transport options
- If deciding to have children
- If EVs become cheaper and more practical (i.e. more reliable infrastructure)

# Urban Professionals Without Cars

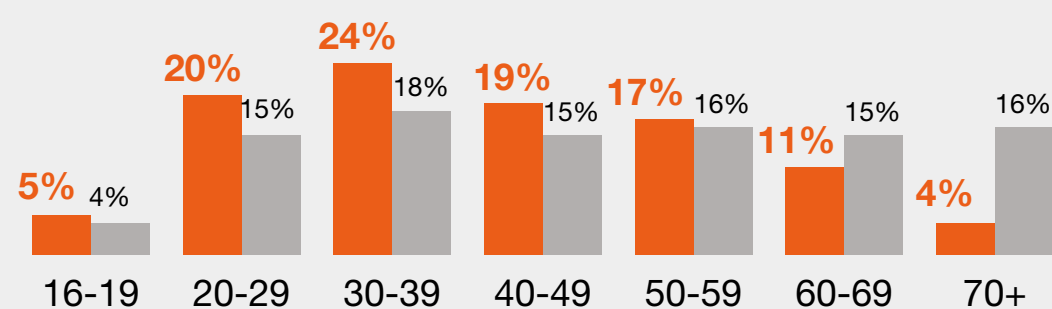
■ Segment 8 ■ All segments

## Who are they?

### Gender

Male **♂47%** 49% Female **♀52%** 51%

### Age



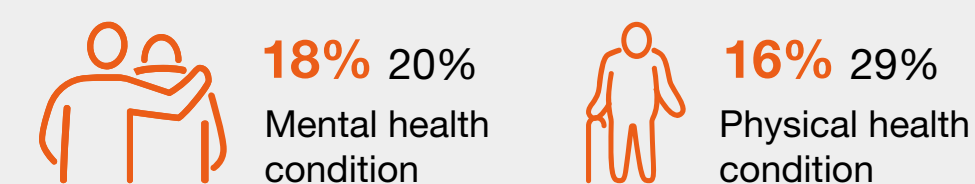
### Mobility difficulties impacting travel



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



### Mental health/physical health condition:

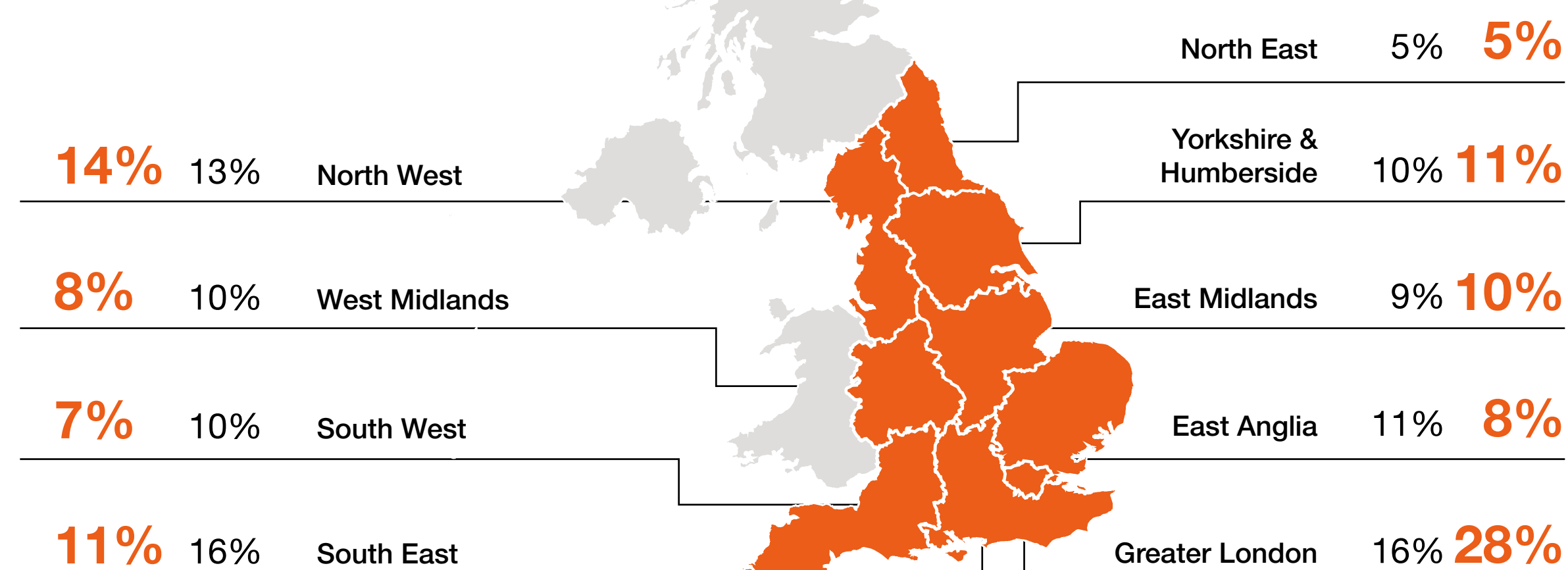


### Ethnicity

77% 88% White | 20% 11% Ethnic Minority

## Location

Urban	Rural
84% 78%	4% 14%



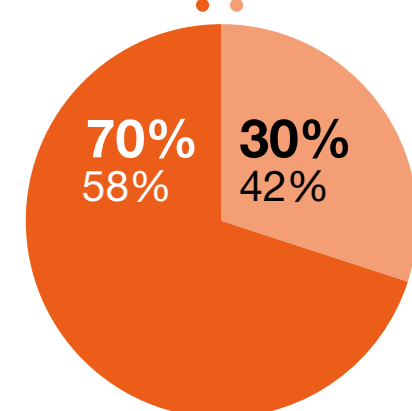
## Employment & working patterns

### Working

- 44% 39% Full-time employed
- 19% 14% Part-time employed
- 8% 6% Self employed

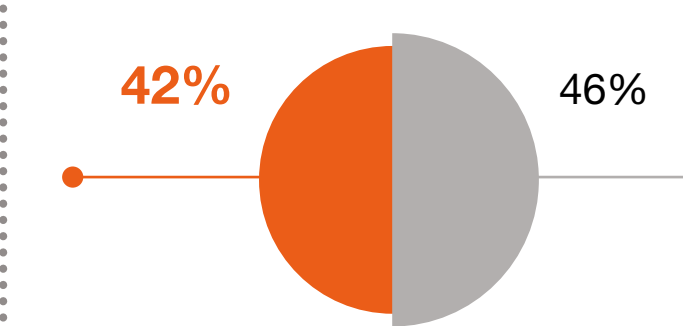
### Not working

- 11% 10% Undemployed
- 9% 23% Retired
- 6% 5% Student/Pupil
- 4% 5% Parent-homemaker



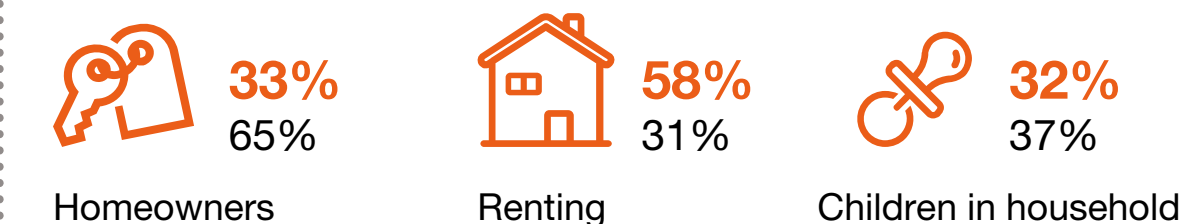
## Shopping behaviours

Regularly use home delivery for food or non-food shopping

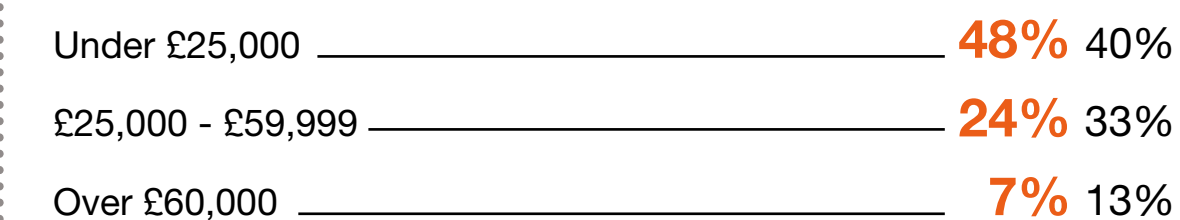


## Household & financials

### Household



### Household finances

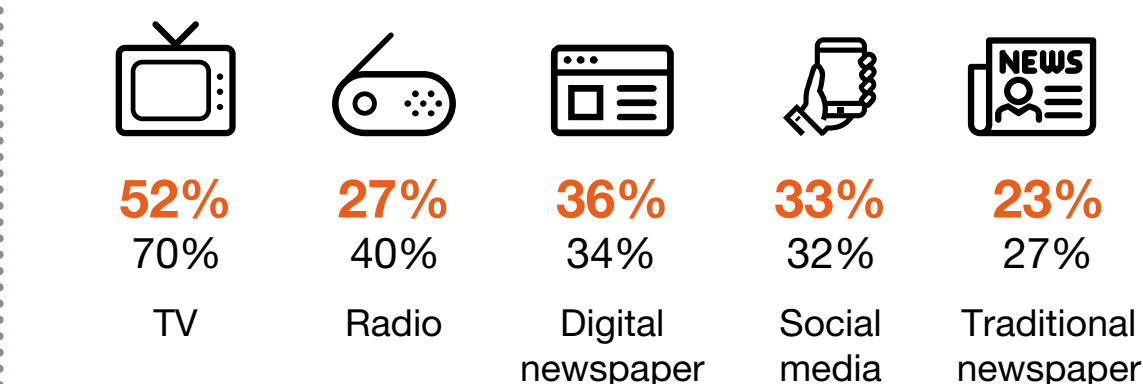


## Technology & media

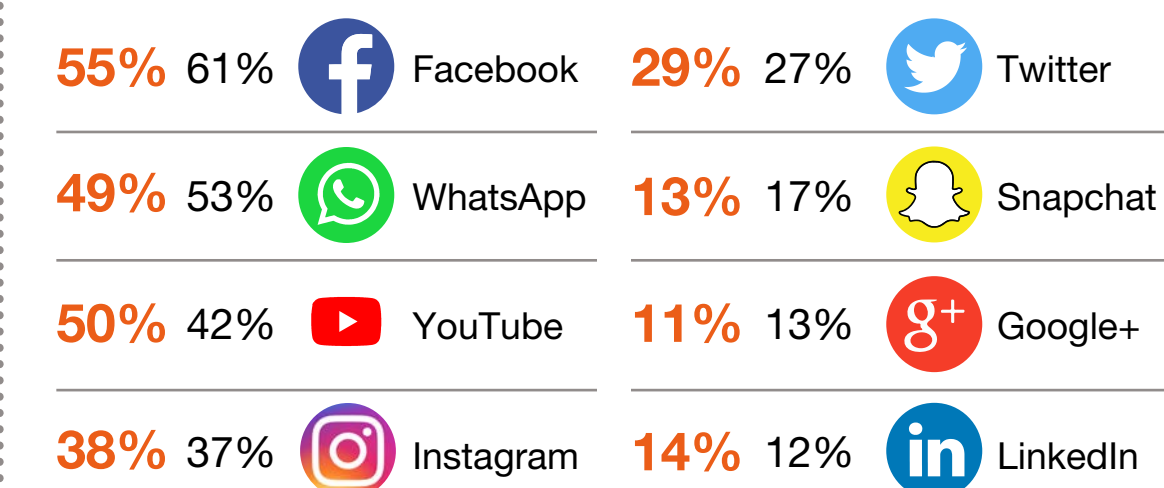
### Use of smartphones



### Consumption of news



### Social media

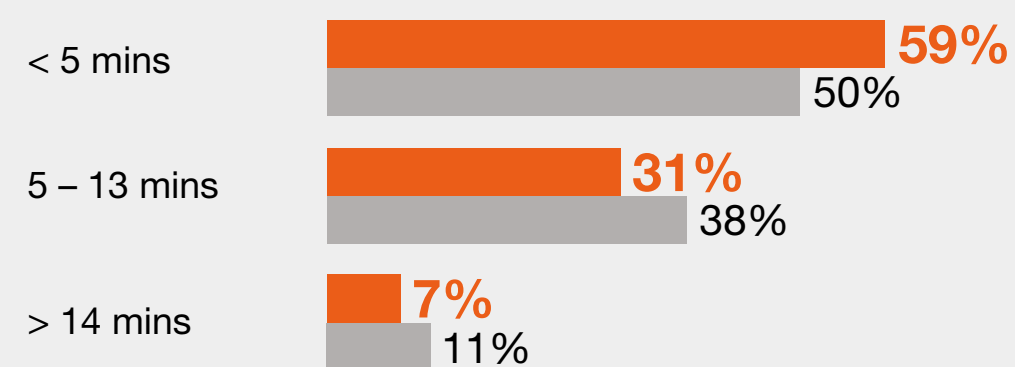


Where percentages do not add up to 100%, this is due to rounding or exclusion of 'Don't know' and 'Prefer not to say' answer codes.

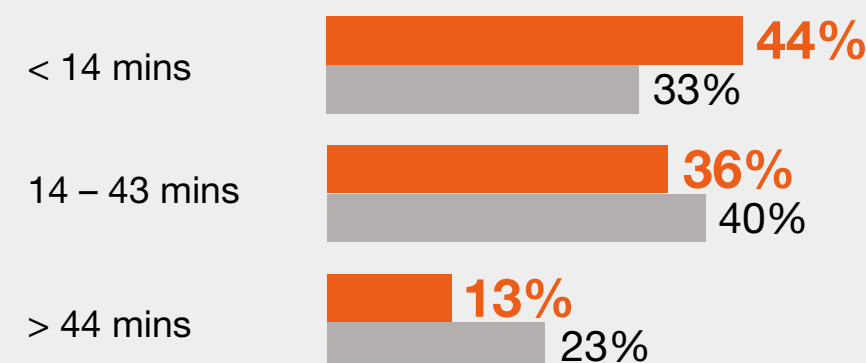
■ Segment 8 ■ All segments

## Access to transport

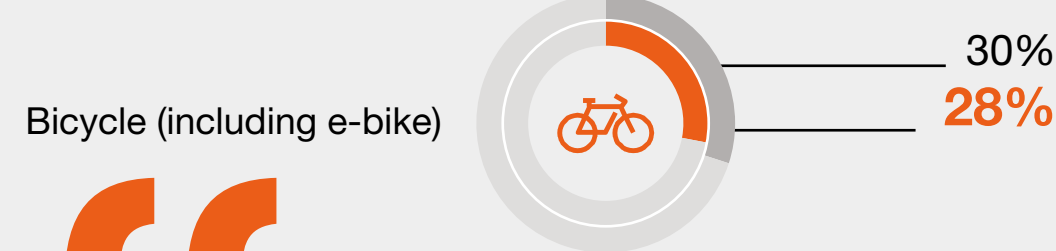
### Distance to nearest bus stop (mins walk)



### Distance to nearest railway station (mins walk)



### Access to:



“I primarily take the bus for my commute. It’s the most convenient and cost effective as otherwise it would be a 45–50 minute walk which is not necessarily feasible if it’s late night or early morning. Even though there can be issues with delays it is usually quite a consistent regular service.”  
(Male, 45, Manchester)

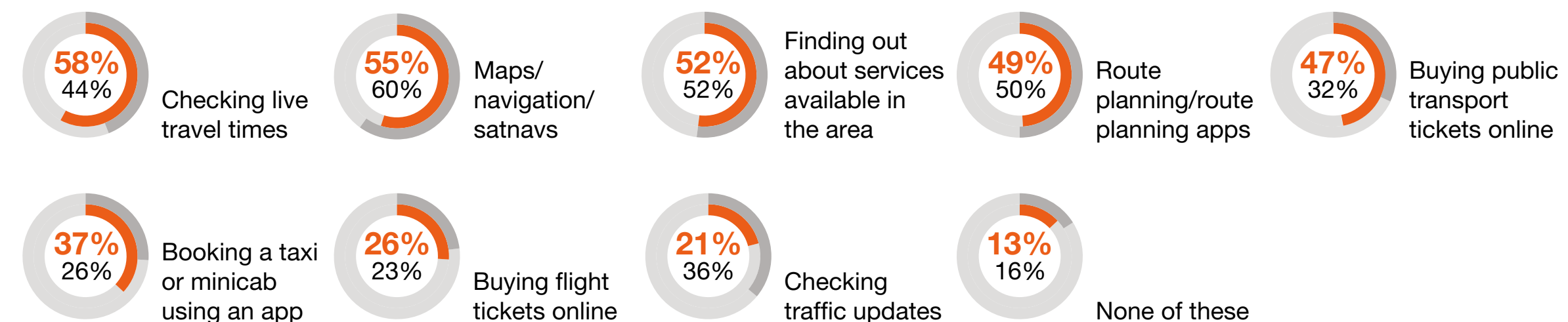
People in this segment are young, live in large urban areas in England, and in close proximity to bus stops and/or train stations. This provides them with more choice about which transport modes to use, allowing them to adapt their travel according to needs, i.e. the fastest or most affordable routes available. They make use of public transport, active travel, and, occasionally, of app-based taxi services such as Uber, or share rides with friends. People in this segment don’t own a car, although some have a driving licence and can drive.

“I live in an area where there are excellent connections to go anywhere in London. The nearest station is a very convenient 5 minute walk from my house. Within a 5 minute walk radius, there are 18 bus stops that go to Central London.” (Female, 37, London)

“My place of work is approximately 9 miles away. Since the pandemic I have worked from home at least 2-3 days a week. When I do travel into work I typically cycle although this has become more of a burden as I now have to transport my computer and other work equipment. Sometimes I do combine cycling with public transport.” (Male, 45, Manchester)

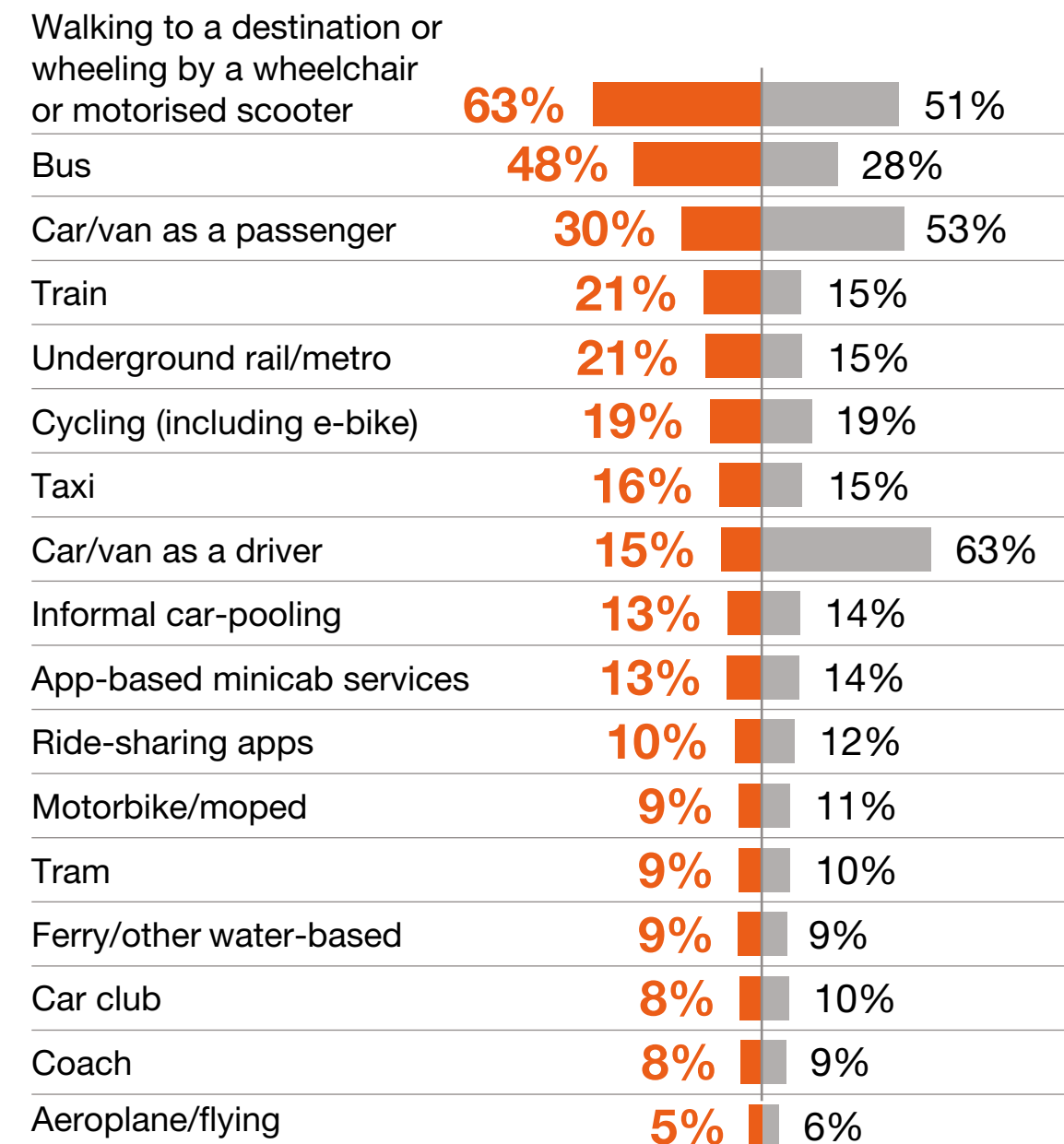
## Understanding transport choices

### 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





## Enablers and barriers to different transport modes

### Car

- ✓ Flexibility/freedom
- ✓ For getting out of the city
- ✗ Traffic
- ✗ Lack of parking spaces

### Walking

- ✓ Short local journeys, up to 20 minutes
- ✓ Physical exercise
- ✓ Mental health
- ✗ Doesn't feel safe early in morning or late at night
- ✗ Poor weather

### Cycling

- ✓ Exercise
- ✓ Speed
- ✓ Environmentally friendly
- ✗ Lack of confidence in self, infrastructure, other road users
- ✗ Safety concerns
- ✗ Not for everyone – “it’s not particularly something that interests me”
- ✗ Poor weather

### Public Transport

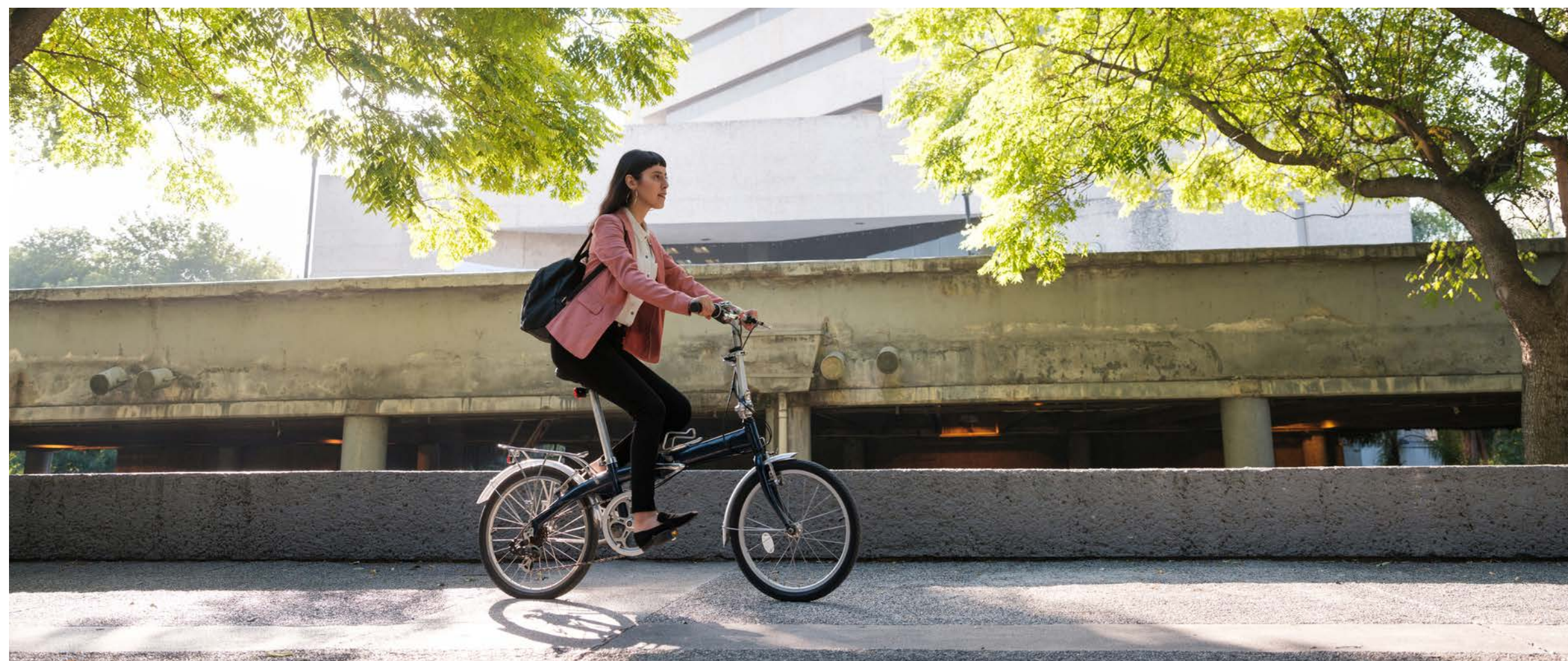
- ✓ Environmentally friendly compared with car use
- ✓ Bus seen as more suitable for familiar routes
- ✓ Bus seen as affordable
- ✓ Train seen as more suitable for long journeys
- ✓ Train was perceived as faster
- ✓ An enjoyable way to travel
- ✗ Train fares seen as expensive
- ✗ Bus services seen as slow
- ✗ Unreliable services (delays, cancellations)
- ✗ Crowded services / lack of available seats
- ✗ Not well connected

## Attitudes towards transport and climate


People in this segment express concerns about the environment and make use of active travel modes. However, the cost of transport, confidence in using some modes more than others, as well as convenience (often defined as fastest and most direct route), take priority when choosing which transport mode people use for their journeys.


*“First of all, I don’t have a car. So, I am a commuter here in the UK. I take all modes of transportation possible, but first and foremost it’s the Tube, because I feel that it’s the fastest. Second would be bus, because I sometimes just feel, like, ‘Okay, I just want to sit down on top of the bus and look out at the different buildings, and look at the streets, and what people are doing every day,’ because it’s something you don’t see when you’re underground.”*  
(Female, 37, London)


*“Because I don’t own a car, if I do have meetings, I’m only 15 minutes away from a bus station, so locality and distance is a huge thing for me.”* (Female, 30, Portsmouth)



Changes in employment (since the pandemic) are one of the main driver of changes in transport behaviour. Hybrid and flexible working arrangements mean commuting takes place 2-3 days per week. Use of active travel modes is a mix of commuting and leisure.

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

 **33%** 37% | Would like to do a bit more to reduce my impact

 **11%** 9% | Would like to do a lot more to reduce my impact

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.