

Meet the Personas

Segment 1
**Less Mobile,
Car Reliant**



Brian

I am a wheelchair user and the door-to-door experience is infinitely easier if I drive.



Betty

Driving helps me to enjoy my retirement and I've become reliant on it due to my arthritis.

Segment 2
**Young Urban
Families**



Farah

My husband and I share our car, and between commuting and school runs – a second car would be very handy!

Segment 3
**Older
Less Affluent**



Gina

I work in adult social care and my car is essential for getting out and about to my clients. I don't have any choice but to drive.

Segment 4
**Comfortable
Empty-nesters**



Jeff

We got rid of one of our cars when we retired. With the slower pace of life, we enjoy using bus and train services.

Segment 5
**Suburban
Families**



Nigel

I work from home a lot more but I still drive to work. I'm hoping that we might be able to afford an electric car soon.

Segment 6
**Heavy Car Users,
Frequent Flyers**



Oliver

I use the car every day – it's down to where I live, my job and driving the kids around.

Segment 7
**Elderly And Low Income
Without Cars**



Peter

I miss the freedom of using my car but having an over-60s pass helps me to get out and about.



Pippa

My spinal condition means that bus journeys are just too uncomfortable, so I am more reliant on lifts from my daughter.

Segment 8
**Urban Professionals
Without Cars**



Rosa

I can get everywhere I need to easily by public transport, but I'd like to use my bike more.

Segment 9
**Young Low Income
Without Cars**



Zoe

I can access bus and Metro services from where I live but I'd love to have my own car when I can afford it.



Zahir

I'm out of work and struggling financially – so I walk and cycle whenever I can to save money for essentials.

..... Non-car Owning Segments

⋮ Non-car owners segments (7-9).

Images used in this document are of fictional people and have been chosen to portray the key characteristics of Personas.

Less Mobile, Car Reliant

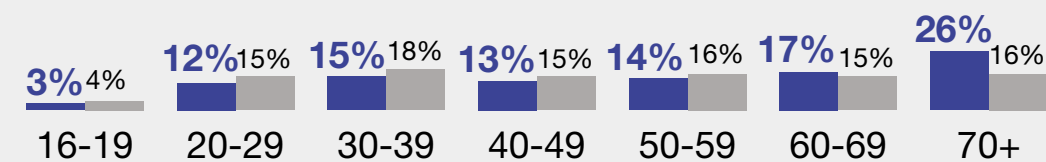
■ Segment 1 ■ All segments

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.

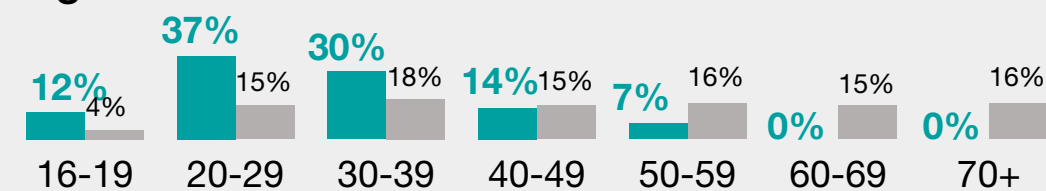
■ Segment 2 ■ All segments

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.

Older Less Affluent

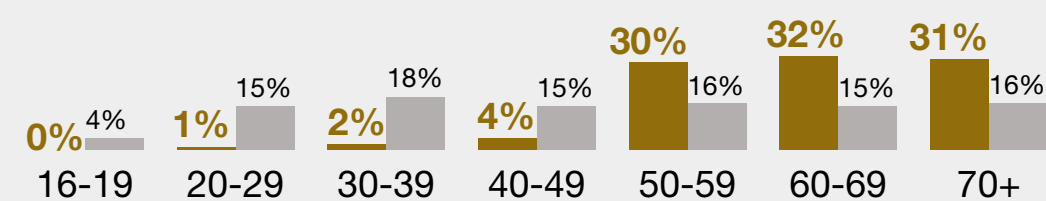
■ Segment 3 ■ All segments

Who are they?

Gender

Male **♂53%** 49% Female **♀47%** 51%

Age



Mobility difficulties impacting travel

0% 25%

Ethnicity

97% 88% White **3%** 11% Ethnic Minority

Household finances

Under £25,000 **57%** 40%
 £25,000 - £59,999 **29%** 33%
 Over £60,000 **2%** 13%

People in this segment are older (50+ years old), car owners and live in two-person households with partners in urban and rural areas.

They are approaching retirement but still working, either in full-time or part-time employment. They use the car as their main mode of transport with driving seen as an enjoyable and convenient activity – it gives control over start time, frequency and location of stops/breaks, and the opportunity to listen to the radio. Less enjoyable aspects of driving are the delays associated with roadworks.

People in this segment use the car for commuting to a place of work, shopping trips, local trips and when socialising. They enjoy using public transport, with frequency and reliability of services being key factors in encouraging use of these services.

Walking is perceived to be suitable for very short distances to places in the town/local area. Attitudes towards cycling are negative – for people in this segment, cycling is not an enjoyable activity or a safe way of travelling.

Gina



- **Age:** 62
- **Lives:** Ashburton, Devon
- **Household composition:** Married, living with husband, two adult children no longer living with them
- **Employment:** Full time in adult social care, works one day per week at home
- **Disability/Health:** No
- **Tenure:** Homeowner, no mortgage
- **Interests and concerns:** Enjoys socialising with friends and going to the cinema; worries about increased cost of living, the environment, education



Enablers and barriers to different transport modes

Car

- ✓ Convenience
- ✓ Enjoyable way to travel
- ✓ Personal attitudes/preference for driving
- ✓ Lack of reliable public transport services
- ✗ Roadworks and traffic
- ✗ Cost of parking
- ✗ Cost of fuel

Walking

- ✓ Health benefits – mental health and physical health
- ✓ Avoiding traffic
- ✓ Suitable for short-distance journeys
- ✓ Availability of facilities nearby
- ✗ Convenience
- ✗ Not suitable for longer journeys
- ✗ Poor health (own health or partner's)
- ✗ Not an enjoyable activity

Public Transport

- ✓ An alternative for driving in situations where the car is not available
- ✓ An enjoyable way to travel – comfortable, and can be a nice, sociable environment on familiar routes
- ✓ Frequent and reliable services
- ✓ Bus stops/train stations in close proximity
- ✓ Cheaper fares
- ✓ Bus lanes can help navigate through heavy traffic quicker
- ✓ Avoiding the need to find a car park and the cost of parking
- ✗ Reliability of services
- ✗ Poor connections
- ✗ Cost
- ✗ Convenience provided by alternative transport modes, such as car
- ✗ Duration of journeys – multiple stops along route compared to a direct journey

General transport habits

- **Works in adult social care, so is on the road four days a week seeing clients** – a car is necessary as local public transport is neither fast, frequent nor sufficiently well-connected.
- **Typically walks to local shops** for grocery shopping and other chores.
- **Two adult children** – she occasionally travels by train to visit her youngest daughter at university in Bristol.



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Comfortable Empty-nesters

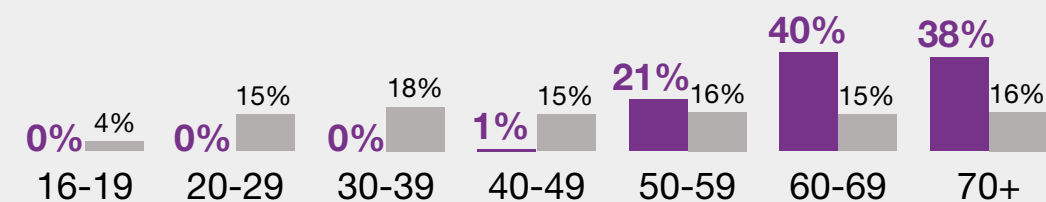
■ Segment 4 ■ All segments

Who are they?

Gender

Male **♂47%** 49% Female **♀53%** 51%

Age



Mobility difficulties impacting travel

0% 25%

Ethnicity

96% 88% White **4%** 11% Ethnic Minority

Household finances

Under £25,000 **39%** 40%
 £25,000 - £59,999 **39%** 33%
 Over £60,000 **7%** 13%

People in this segment are older (60+ years old), predominantly from a white background and either approaching retirement or recently retired.

They own a car and live in more affluent areas of rural and suburban England. People in this segment use a mix of car, public transport and active travel modes. Use of active travel modes is influenced by attitudes towards health, the environment, and cost.

The car is seen as a convenient way to travel and is commonly used for shorter door-to-door trips or for leisure. In rural areas, where public transport infrastructure is less available, driving to different locations is a necessity. Public transport use is more sporadic and seen as more suitable for longer trips. For those who are able to benefit from a free bus pass, public transport is more appealing. However, this is heavily influenced by availability and reliability of services.

Jeff



- **Age:** 64
- **Lives:** Macclesfield, Cheshire
- **Household composition:** Married, living with wife and a cat; two adult children no longer living with them
- **Employment:** Retired, former Barrister
- **Disability/Health:** No
- **Tenure:** Homeowner, no mortgage
- **Interests and concerns:** Enjoys the weekly pub quiz and going to the theatre; worries about the NHS, the increased cost of living, and global instability



Enablers and barriers to different transport modes

Car

- ✓ Convenience
- ✓ Lack of reliable public transport services
- ✓ Lack of active travel facilities when attending social events
- ✓ Cost-effective on longer journeys (compared to public transport alternatives)
- ⊗ Positive attitudes towards the environment
- ⊗ Preference for public transport /active travel – personal preference or cost
- ⊗ Life habits and beliefs towards active travel modes – health benefit

Walking

- ✓ Convenience/saving time
- ✓ Distance to facilities and services in the local area
- ✓ Perceived as suitable for shorter, daytime journeys
- ⊗ Safety concerns
- ⊗ Poor weather
- ⊗ Not suitable for longer journeys
- ⊗ Not an enjoyable activity

Cycling

- ✓ Positive attitudes towards the environment
- ✓ Health benefits – keeping fit/exercising
- ✓ Fast and cost-effective way of travelling
- ✓ Life habits/personal preference
- ⊗ Lack of facilities for changing - suitable for travelling to social and work events
- ⊗ Safety concerns

Public Transport

- ✓ A more environmentally friendly alternative to driving
- ✓ Frequent and reliable services
- ✓ Bus stops/train stations in close proximity
- ✓ An enjoyable way to travel
- ⊗ Reliability of services
- ⊗ Poor connections and journey duration
- ⊗ Convenience provided by the car
- ⊗ Cost (particularly trains)
- ⊗ Lack of space for luggage/bikes

General transport habits

- **Recently retired** from his career as a barrister for the civil service.
- **Used to be a two-car household** but they've gone down to one as no longer needed with both retired.
- **Jeff is the main driver** – his wife's eye condition means that they feel it is no longer safe for her to drive.
- **Jeff uses public transport now more for leisure** – for example, going into Manchester for the theatre or getting the bus to go shopping locally.



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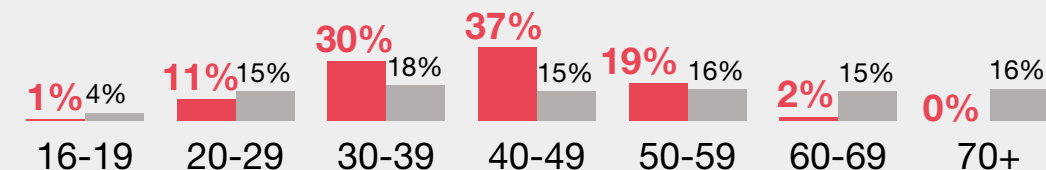
■ Segment 5 ■ All segments

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.



Heavy Car Users, Frequent Flyers

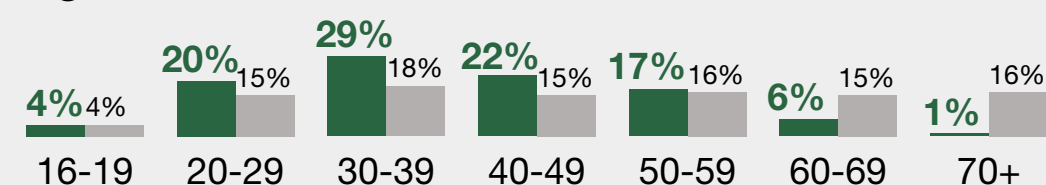
■ Segment 6 ■ All segments

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.



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Elderly And Low Income Without Cars

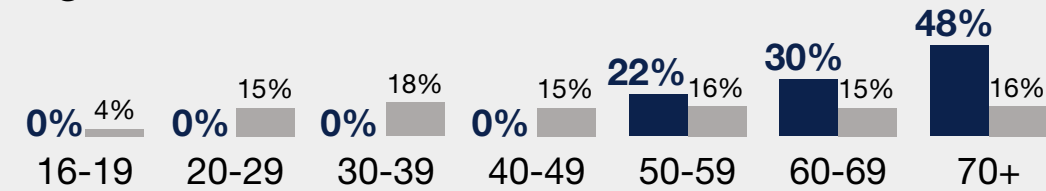
■ Segment 7 ■ All segments

Who are they?

Gender

Male **♂42%** 49% Female **♀58%** 51%

Age



Mobility difficulties impacting travel



Ethnicity

95% 88% White **4%** 11% Ethnic Minority

Household finances

Under £25,000 **78%** 40%
 £25,000 - £59,999 **10%** 33%
 Over £60,000 ***%** 13%

People in this segment are older, likely to live alone, and often have one or multiple health conditions. They do not own a car.

Their health is impacting their mobility and they make fewer journeys compared to people in other segments. They rely on public transport or on other family members to drive them to destinations which are less accessible by public transport. Getting the bus is seen as a great option for short journeys in the local area or to neighbouring towns. It is also a cost-effective option, as people in this segment are likely to own a free bus pass.

Peter



- **Age:** 67
- **Lives:** Dudley, West Midlands
- **Household composition:** Divorced, lives alone in terraced house, one adult daughter
- **Employment:** Recently retired, formerly worked as a builder
- **Disability/Health:** Osteoarthritis; hip replacement
- **Tenure:** Homeowner, no mortgage
- **Interests and concerns:** A season ticket holder at Wolverhampton Wanderers; worries about the rising cost of living
- **Driving licence:** Yes, full

Pippa



- **Age:** 76
- **Lives:** Aldsworth, Gloucestershire
- **Household composition:** Widowed, lives alone with her dog
- **Employment:** Retired for 18 years, former Midwife
- **Disability/Health:** A visual impairment and a spinal condition
- **Tenure:** Renting a retirement apartment
- **Interests and concerns:** Loves literature and writes short stories; worries about climate change and the cost of energy bills
- **Driving licence:** Yes, full

Enablers and barriers to different transport modes

Car

- ✓ Convenient, especially for short journeys to see friends and family
- ✓ Availability of taxi services in the local area
- ✓ Comfortable way to travel
- ✓ A safer alternative for evening travel
- ⊗ Physical health conditions
- ⊗ Cost of using taxi services
- ⊗ Loss of driving licence (e.g. on medical grounds)

Walking

- ✓ Health benefits - staying active/keeping fit
- ✓ Recreation and socialising – walking pets alone/with friends
- ✓ No cost associated with it
- ✓ Environmental benefits
- ⊗ Health condition (physical or mental health)

Cycling

- ⊗ Life stage
- ⊗ Physical health conditions
- ⊗ Roads in poor condition and associated safety concerns
- ⊗ Not cheaper than public transport thanks to free bus pass

Public Transport

- ✓ Frequent and reliable services
- ✓ Bus stops/train stations in close proximity
- ✓ Discounted/free travel
- ✓ Environmental benefits
- ⊗ Public transport provision in the local area
- ⊗ Distance to nearest bus stop/train station
- ⊗ Safety concerns – e.g. travelling late in the evening
- ⊗ Health concerns – for those in a vulnerable health group
- ⊗ Roads in poor condition

General transport habits

- **Can't afford his own car** nowadays and misses the freedom it used to give him.
- Is able to access **free local transport via free bus pass**.
- **Mainly travels within the West Midlands**, either taking the bus or getting a lift with his friends to watch Wolverhampton FC.
- **Tends to go out less than he used to** as things are more expensive, especially intercity trains.
- **Tends to do his weekly shop in person to save on the delivery fee** – the walk to the shops also allows him to do some of the exercise he needs to help with his arthritis.

General transport habits

- **Has a free bus pass but struggles to use it** – her spinal condition makes bus journeys uncomfortable.
- **Her primary journeys are trips to the hospital and to the vets** (daughter drives her).
- Due to health conditions she is **unable to walk very far**, on a good day she takes the dog for a walk.
- Used to drive but **visual impairments and headaches** means she cannot do this and no longer owns a car.

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.

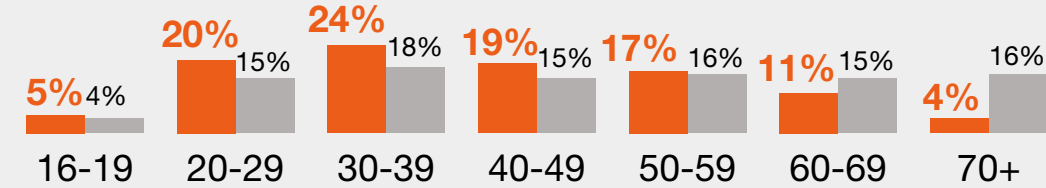
■ Segment 8 ■ All segments

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.

Young Low Income Without Cars

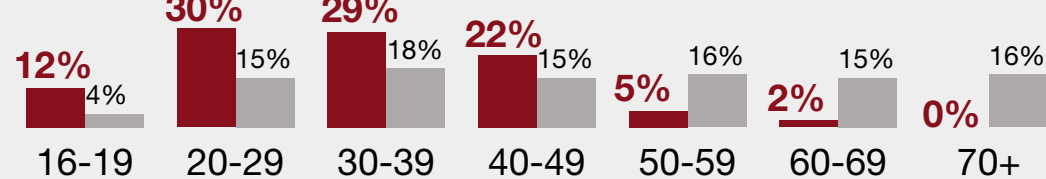
■ Segment 9 ■ All segments

Who are they?

Gender

Male **♂55%** 49% Female **♀42%** 51%

Age



Mobility difficulties impacting travel

25% **61%**

Ethnicity

76% 88% White **18%** 11% Ethnic Minority

Household finances

Under £25,000 **66%** 40%
 £25,000 - £59,999 **12%** 33%
 Over £60,000 **3%** 13%

People in this segment are younger adults, living in urban areas. They are most likely to be students, unemployed and looking for work, or in low paid jobs, thus finding it difficult to manage financially.

Active travel modes and public transport are a popular choice among people in this segment as they are affordable and transport provision is good in their local area. Occasionally, they share car rides with family and friends, or colleagues. Most common journeys involve trips to school, volunteering activities, school drops and commuting to a place of work. Bus and, where available, tram services are a favourite among this segment, mostly due to being affordable and convenient, particularly for commuting and shopping trips. People in this segment also expressed a preference for walking, especially for short journeys.

Enablers and barriers to different transport modes

Car

- ✓ Getting lifts from friends, family, and colleagues
- ✓ Convenient way to travel
- ✗ Cost is a consideration for future potential purchases
- ✗ Cost of car (fuel and ownership)
- ✗ Lack of driving licence
- ✗ Lack of parking availability, and cost
- ✗ Availability of cheaper alternatives – public transport, active travel modes”

Walking

- ✓ A good alternative for non-drivers
- ✓ Suitable for short journeys/as part of longer journeys
- ✓ Health benefits - staying active/keeping fit
- ✓ No cost associated with it
- ✓ Environmental benefits
- ✗ Poor weather conditions
- ✗ Perceived as not suitable for long distances

Cycling

- ✓ Cost-effective compared with other transport modes
- ✓ Faster compared with other public transport modes
- ✓ Health benefits: recreation/keeping fit
- ✓ Environmental benefits
- ✗ Seen more as a recreational activity (with children)
- ✗ Not an activity shared with social group
- ✗ Cost of buying and charging an e-bike
- ✗ Discomfort due to poor condition of roads
- ✗ Competition from public transport alternatives which are perceived as more convenient
- ✗ Poor weather conditions

Public Transport

- ✓ Convenient – a good alternative for non-drivers
- ✓ Frequent and reliable services
- ✓ Bus stops/train stations in close proximity
- ✓ Cheaper/discounted travel
- ✓ Environmental benefits
- ✗ Cost
- ✗ Duration of journeys and delays
- ✗ Lack of space for prams
- ✗ Safety concerns
- ✗ Health concerns associated with risk of respiratory infections

Zoe



- **Age:** 21
- **Lives:** Gosforth, Newcastle
- **Household composition:** Lives with her 1 year old daughter in her Mum’s rented flat
- **Employment:** Student, training as a Teaching Assistant
- **Disability/Health:** No
- **Tenure:** Rented from Local Authority
- **Interests and concerns:** Enjoys knitting and reading; worries about climate change, poverty, and global peace
- **Driving licence:** Yes, provisional

General transport habits

- **Zoe typically uses the Metro**, bus and walks when going to her local college.
- There are lots of shops nearby, so **Zoe usually does the grocery shop on foot**, often with her Mum.
- **Hopes to have a car eventually**, once she has qualified and moved into her own place with her daughter.

Zahir













- **Age:** 26
- **Lives:** Watford, Hertfordshire
- **Household composition:** Shares with 3 other people
- **Employment:** Unemployed
- **Disability/Health:** Depression and anxiety
- **Tenure:** Renting
- **Interests and concerns:** Enjoys riding his bike, playing football, and socialising with friends; worries about the cost of living, jobs / unemployment, and the NHS
- **Driving licence:** No

General transport habits

- **Most of his trips are local** – in and around Watford and North London where he can walk, cycle, or take the bus.
- **Slightly longer journeys** include seeing friends in Harpenden, **he will use the Overground or local train services.**
- **Many of his friends are in Harpenden** nowadays and he wants to get a job near there soon.

Personas: approximate segment size

For each segment, an approximate segment size (expressed as a range: 5% or less; 6-10% and 11-20%) has been developed to provide guidance on relative size of the segments. This range takes into account the size of each segment observed across a number of surveys that have segmented the population of England aged 16+.

<p>Segment 1 Less Mobile, Car Reliant</p>  <p>Brian I am a wheelchair user and the door-to-door experience is infinitely easier if I drive.</p> <p>11-20%</p>	<p>Segment 2 Young Urban Families</p>  <p>Farah My husband and I share our car, and between commuting and school runs – a second car would be very handy!</p> <p>11-20%</p>	<p>Segment 3 Older Less Affluent</p>  <p>Gina I work in adult social care and my car is essential for getting out and about to my clients. I don't have any choice but to drive.</p> <p>6-10%</p>	<p>Segment 4 Comfortable Empty-nesters</p>  <p>Jeff We got rid of one of our cars when we retired. With the slower pace of life, we enjoy using bus and train services.</p> <p>11-20%</p>	<p>Segment 5 Suburban Families</p>  <p>Nigel I work from home a lot more but I still drive to work. I'm hoping that we might be able to afford an electric car soon.</p> <p>11-20%</p>	
<p>Segment 6 Heavy Car Users, Frequent Flyers</p>  <p>Oliver I use the car every day – it's down to where I live, my job and driving the kids around.</p> <p>11-20%</p>	<p>Segment 7 Elderly And Low Income Without Cars</p>  <p>Peter I miss the freedom of using my car but having an over-60s pass helps me to get out and about.</p> <p>5% or less</p>  <p>Pippa My spinal condition means that bus journeys are just too uncomfortable, so I am more reliant on lifts from my daughter.</p> <p>5% or less</p>		<p>Segment 8 Urban Professionals Without Cars</p>  <p>Rosa I can get everywhere I need to easily by public transport, but I'd like to use my bike more.</p> <p>6-10%</p>	<p>Segment 9 Young Low Income Without Cars</p>  <p>Zoe I can access bus and Metro services from where I live but I'd love to have my own car when I can afford it.</p> <p>5% or less</p>  <p>Zahir I'm out of work and struggling financially – so I walk and cycle whenever I can to save money for essentials.</p> <p>5% or less</p>	

Non-car Owning Segments

⋮ Non-car owners segments (7-9).

Images used in this document are of fictional people and have been chosen to portray the key characteristics of Personas.