



Attitudes towards walking segmentation summary 2014

Introduction and description

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May 2014

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Introduction

Aims

- The overall objective of this project was to create a segmentation which differentiates between people with different walking behaviours. This segmentation could then be used to assist with policy development, marketing communications, and evaluation, by identifying where the potential for more walking exists.
- More specifically, the aim was to create a segmentation which could be used to provide guidance not just on which policies and interventions might be most appropriate, but also *where* it would be most appropriate to implement them.
- To achieve this, the segmentation developed is a geodemographic one; that is, it combines geographic with demographic / lifestyle variables.

Context

- It is important to bear in mind the nature of walking as a transport mode and how it differs from other modes. The key difference is due to the fact that (almost) everybody walks, if only a little. What distinguishes people is therefore the *extent* to which they walk, both in terms of the number of walk trips they undertake (whether as part of a multi-stage journey, or a walk all the way trip) and the share of trips walked all the way to the destination.
- This is different to other modes and therefore the nature of the segmentation differs, for example, from the MOSAIC Driver segmentation and particularly from the MOSAIC Cyclist segmentation. In both these cases, the differences in use of the mode between the segments are much greater because some people do not use the mode at all, and others use the mode as their dominant means of travel.
- In the case of walking then, the challenge is to distinguish between relatively subtle differences in the extent to which people walk currently, and could walk more.
- Within this context, a limitation within which we have worked is lack of hard evidence on the potential for more walking. We have addressed this by referring to the work on the 'Best Opportunities' for each mode. This uses behavioural and attitudinal data to predict the relative propensity for different types of people to use a particular mode more often in the future (given appropriate policies or interventions).
- In this way, we have attempted to examine both the current behaviour of different segments and the potential for additional walking in the future amongst each segment. This aims to answer questions about whether the greatest potential is amongst encouraging people who walk only a little to walk more, or amongst those already happy to walk but who might walk even more.

Methodology

- I A number of data sources have been used to create the segmentation:
 - London Travel Demand Survey (LTDS) 2008/9
 - Travel diary of Londoners, including personal and household demographics
 - Used for stage level travel data, demographics
 - Segmentation survey, 2009
 - Survey of Londoners to segment respondents for each mode in terms of behaviour and attitudes
 - Used for frequency for types of walks, use of modes, willingness to walk to stations/ stops, attitudes to modes, best opportunity
 - Attitudes to walking, 2010
 - Annual survey of Londoners monitoring attitudes towards and behaviour relating to walking
 - Used for attitudes statements, consideration of walking more
 - MOSAIC 2007
 - Geodemographic segmentation based on postcode
 - Used for demographics, locational information, population, comparison with other segmentations
- I To create the segmentation, we:
 - 1) Established the key drivers of walking by analysing and profiling walking stages in LTDS (see next page)
 - 2) Compared these key drivers by MOSAIC Type to identify MOSAIC Types with similar walking characteristics
 - 3) Grouped the 61 MOSAIC Types into 7 initial walking segments
 - 4) Tested and refined the segmentation through two further iterations to produce the final groupings
 - 5) Profiled the resulting walking segments (in terms of travel behaviour, demographics and attitudes)

Defining walking

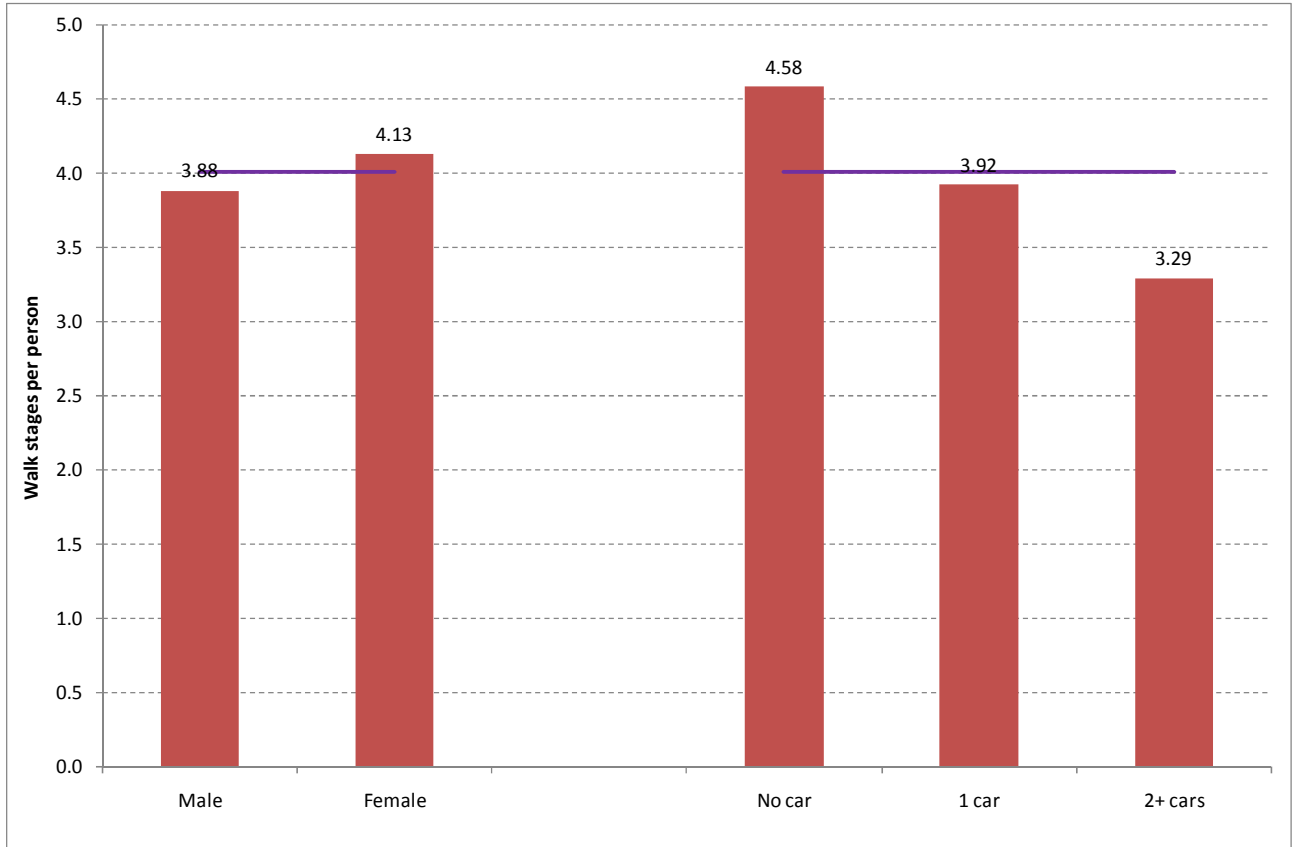
- I “Walking” can be defined in different ways and indeed in each of the survey sources used there are notable differences:
 - In **LTDS**, a trip is only allocated as ‘walked’ if it is walked all the way, so, for example, it excludes walking to a bus stop. However, trips in LTDS are broken down into individual stages, and this level of detail can be used in order to include walking to/from other modes
 - The **Attitudes to Walking** survey includes any walks of 5 minutes or more in London. In addition, there are a list of exclusions such as walking the dog and interchanging between Underground/ rail lines
 - In the **segmentation** survey, walks are split into “walking for leisure”, “walking by choice to a destination” and “walking out of necessity to a destination”
- I In addition to the differing definitions, there is a range of ways walking can be measured:
 - Average walk stages per day
 - Average km walked per stage
 - Average km walked per day
 - Average days per annum walked
- I Finally, walks can be divided by purpose and/or type of trip. For example we can distinguish between trips that are walked all the way versus walk stages used to access another mode, and walking for leisure versus walking for a purpose.
- I Page 10 shows a range of measures of walking by segment
 - For this project, the key measure used is the mean **walk stages per day** (stages are explained on the next page)
- I In this report, stages are allocated as one of two types of ‘utility’ stage: walk all the way (A-B walks) or walk as access mode (access or egress from another mode/ link trips).
- I Leisure walks have not been separated from these walk stages except where specified.

Key drivers of walking

- The key drivers of walking are gender, age & lifestage, car ownership, income and whether live in central, inner or outer London.
- **Females** travel more stages per day and walk more stages per day compared to males (see Figure 1), although females travel and walk a shorter distance per stage compared to males
- **People aged 20-44** walk more stages per day than older people
- Combining age and gender makes the differences greater (see Figure 2):
 - **Females aged 20-44** walk the most stages per day. There is a particular difference in walking activity between females and males aged 35-44
- Lifestage appears to be a key differentiating factor:
 - **Single adults, with or without children**, walk more stages per day than adults in couples
- Further differences are seen by gender
 - Males in a couple with children walk the fewest stages per day, particularly compared to single adult males
 - **Females with children**, either in a couple or single, walk more than those without children
- People living in **Central London** walk more stages per day than those living in Inner, and particularly those living in Outer London
- The average number of walk stages per day drops with an increase in the number of **cars owned** (see Figure 1)
 - The travel of people without a car includes more stages per day in total, and the share of these stages walked is higher
- The average number of walk stages is higher than average for those with a **higher income**, which seems somewhat counter-intuitive, but has been seen in previous research to be related to narrower travel horizons amongst those on lower incomes:
 - The lowest walking rates are seen for people with a household income of £20-35,000
- Less differentiation can be seen by employment status:
 - However, people **looking after home/ family** appear to walk more stages per day, while retired people walk fewer stages per day
 - This relates to the demographics mentioned above (age and lifestage)
- There are also differences between groups in terms of walking all the way and walk as access mode stages:
 - For example, people with no car have a larger share of their walk stages as walk all the way, as do those who live in Central London and those with children

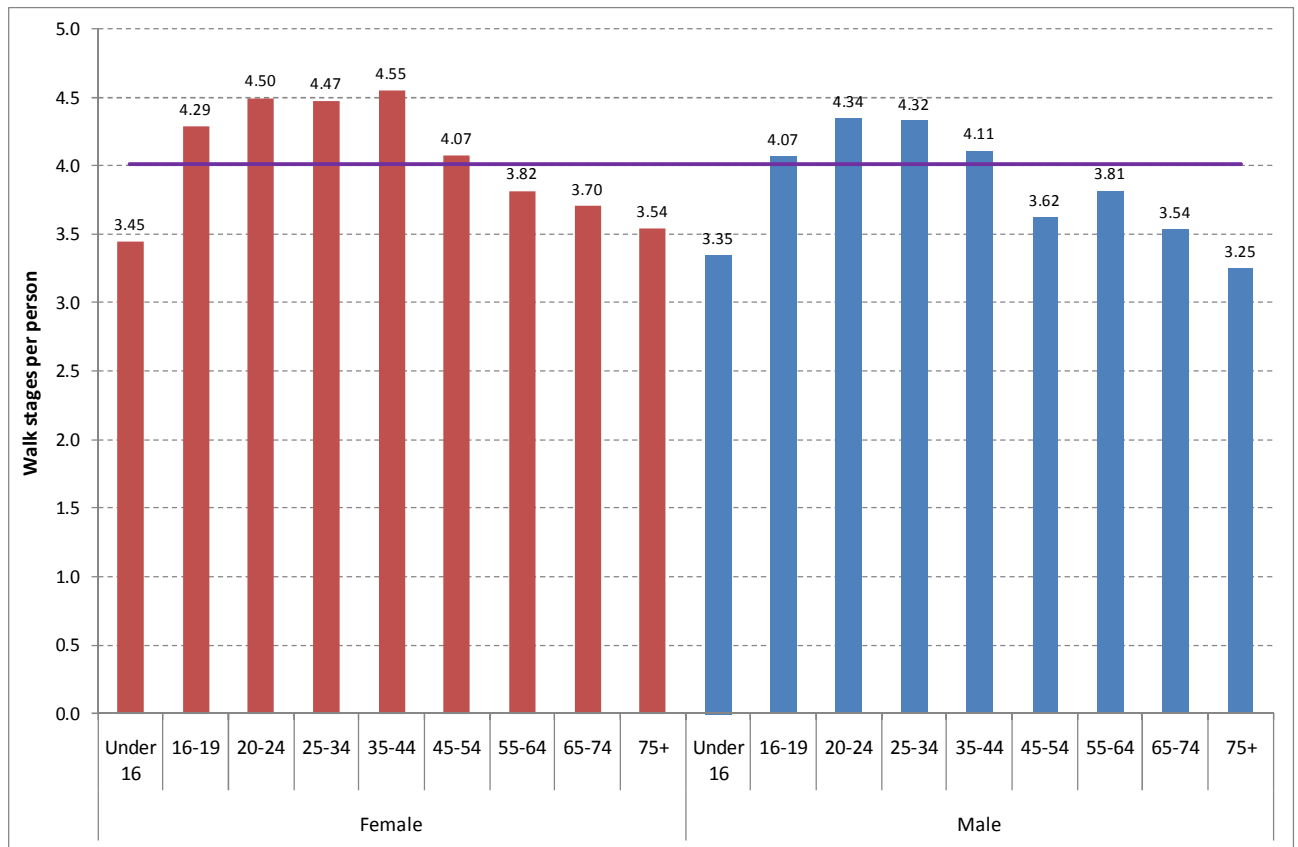
Key drivers of walking

Figure 1: walk stages by gender and car ownership



Source: LTDS 2008/9

Figure 2: walk stages by gender and age

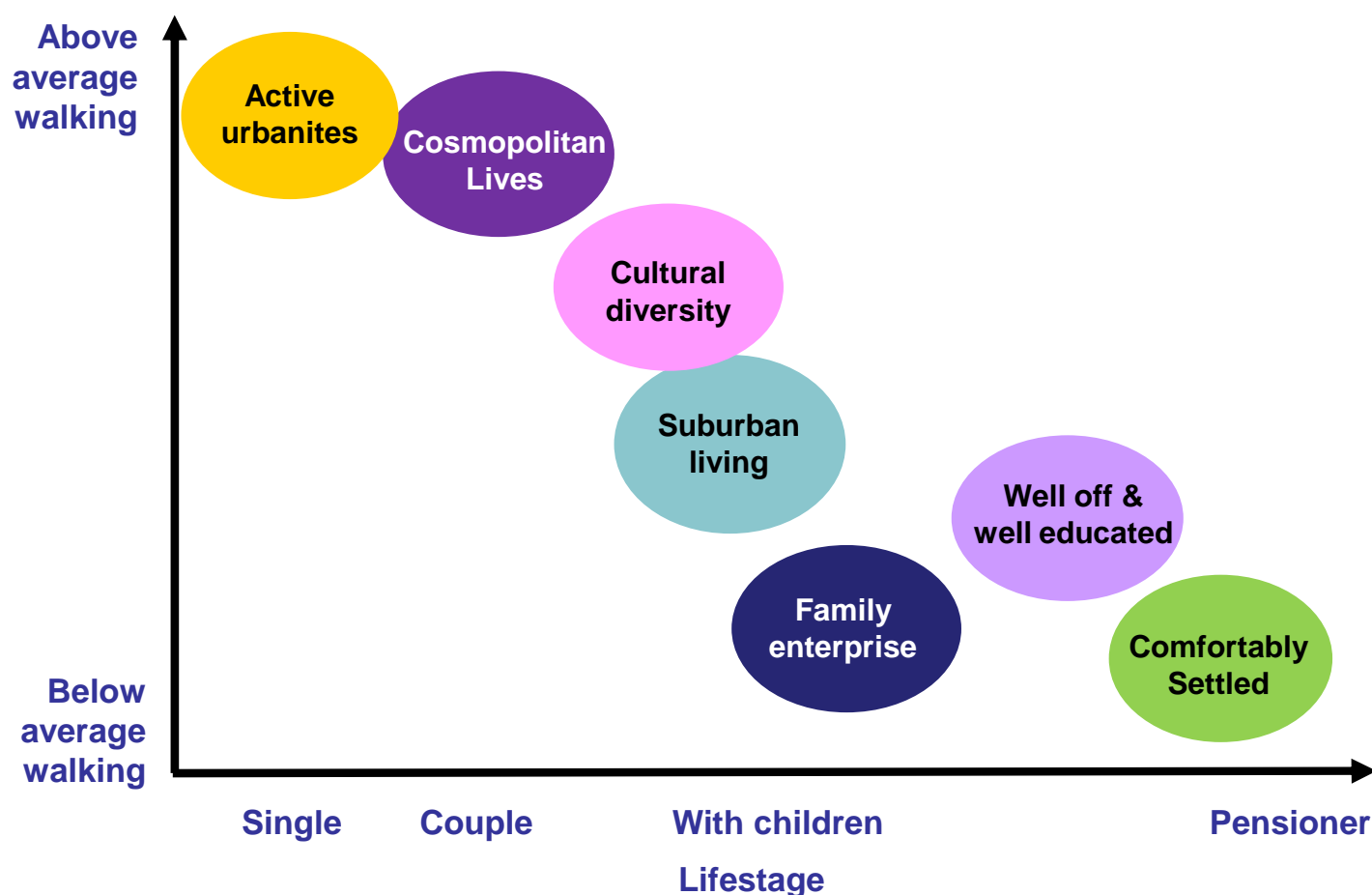


Source: LTDS 2008/9

Perceptual map of walking segments

- Based on these key drivers (age/lifestage, cars in household/income, central/inner/outer London) we have identified seven geodemographic segments, each with different current walking behaviours.
- These segments are illustrated below in terms of two key dimensions: amount of walking and lifestage. Note that a discussion on defining the amount of walking is included on the next page. The chart below is actually based on a composite measure of walking taking into account number of walk stages, walk all the way trips, and length of walking stages.

Figure 3: Perceptual map of segments



London population ('000s)	1,209	810	1,675	1,254	377	530	464
% of population	19%	13%	26%	20%	6%	8%	7%

Source: ONS mid year estimates 2009, adults aged 16+

Walking behaviour

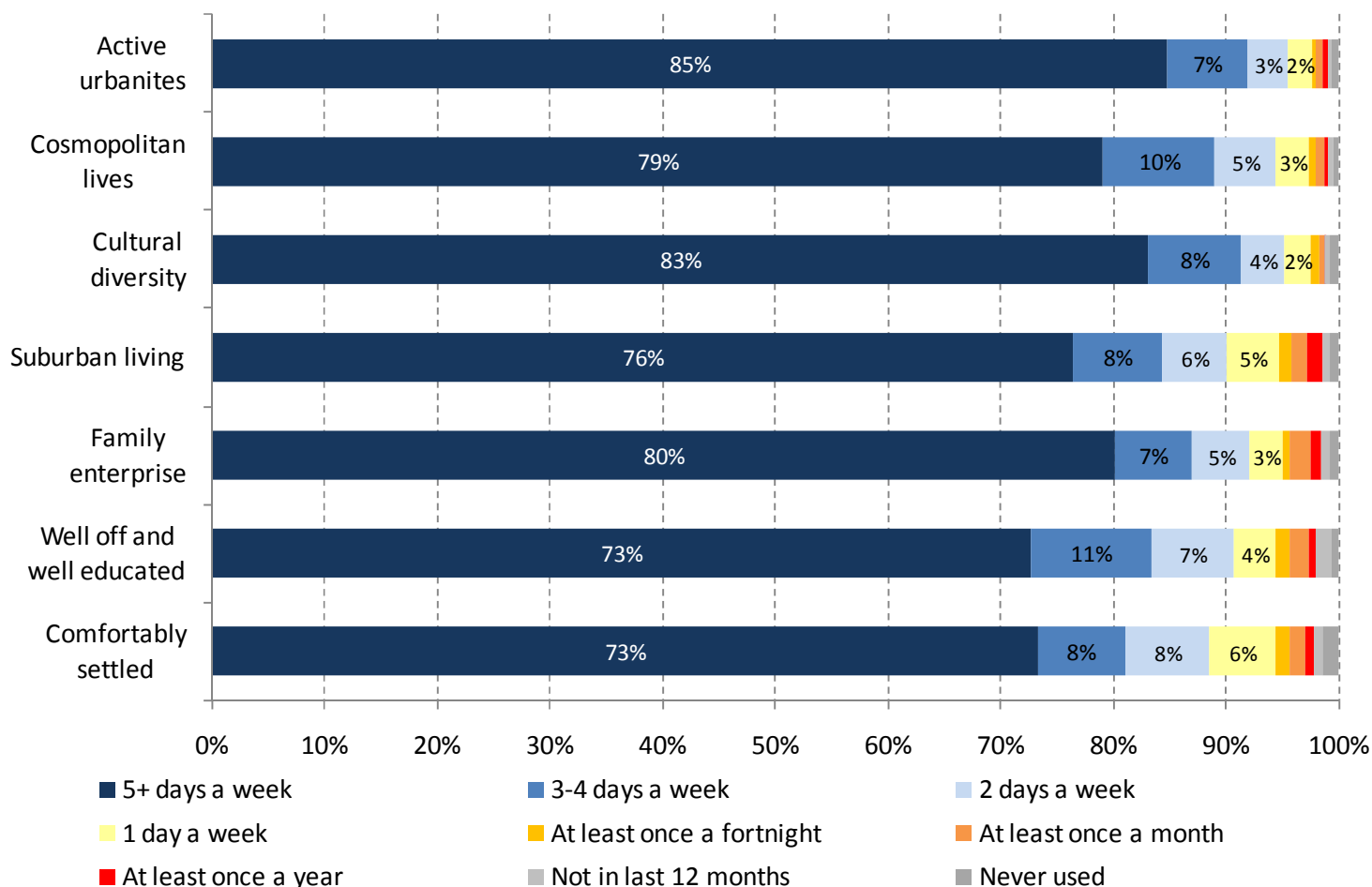
- The table below compares different measures of walking between each of the segments.
- This shows some subtle differences in terms of walking behaviour so, for example, the *Well off & well educated* segment ranks near the bottom for number of walk stages, but higher for their length.
- Further comparisons between the segments are made on the following pages.

Name	All walk stages	Walk all the way stages only	Walk km per person		Walk for leisure	Walk for utility	Walk out of necessity
	Mean walk stages per day per person (LTDS)		Mean km per stage (LTDS)	Mean km per day (LTDS)	Average days per week (Segmentation)		
Active urbanites	4.77	1.11	0.33	1.56	2.2	3.5	2.8
Cosmopolitan lives	4.73	1.20	0.31	1.47	2.4	3.0	2.7
Cultural diversity	4.36	0.94	0.30	1.30	2.1	2.8	2.3
Suburban living	3.60	0.70	0.27	0.99	2.0	2.7	2.0
Family enterprise	3.51	0.71	0.30	1.04	1.7	2.0	1.7
Well off & well educated	3.46	0.87	0.33	1.13	2.2	2.5	1.9
Comfortably settled	3.31	0.73	0.25	0.82	1.9	2.1	1.7
London average	4.11	0.92	0.30	1.24	2.1	2.8	2.2

Walking behaviour: Frequency of walking

- The chart below compares the frequency of walking all the way between the segments.
- For example, 85% of *Active urbanites* make walk all the way trips daily, compared with 73% of the *Comfortably settled*.

Figure 4: Frequency of walking by segment



Source: LTDS 2008/9

- The charts on the next page show the volume of walking by weekday and weekend day, and the purposes of walk trips.
- The day type chart shows that fewer journey stages are made on weekend days for all segments except *Comfortably Settled*.
- Overall, the walk share is similar on both day types although the volume is lower at the weekend.
- The purpose chart reflects that there is less commuting and travel to education on weekend days, and more leisure travel.
- Generally, leisure and shopping make up large shares of all walk stages.

Walking behaviour: walking purposes & day type

Figure 5: Daily volume of stages by segment – weekdays and weekend days

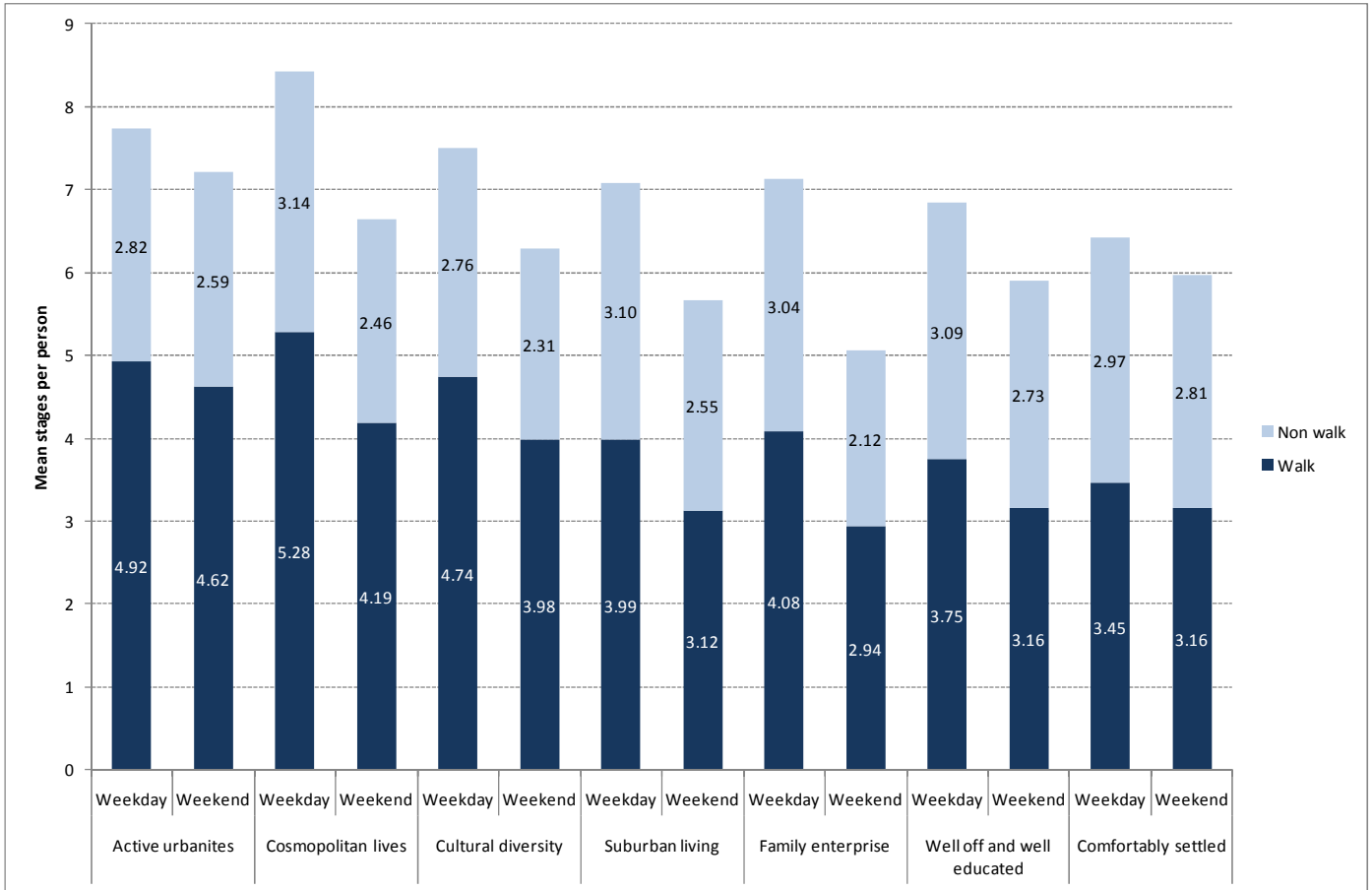
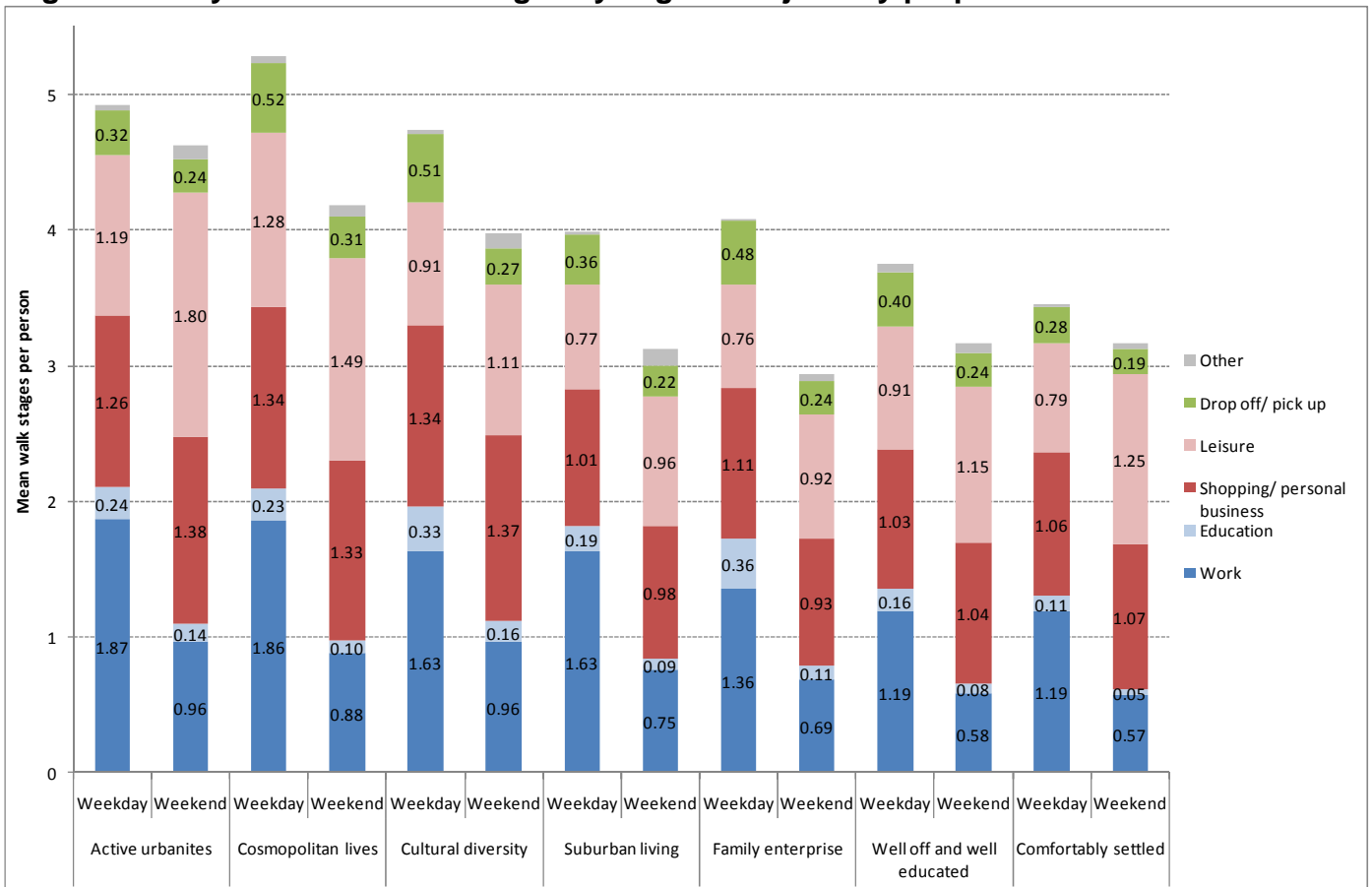


Figure 6: Daily volume of walk stages by segment – journey purpose

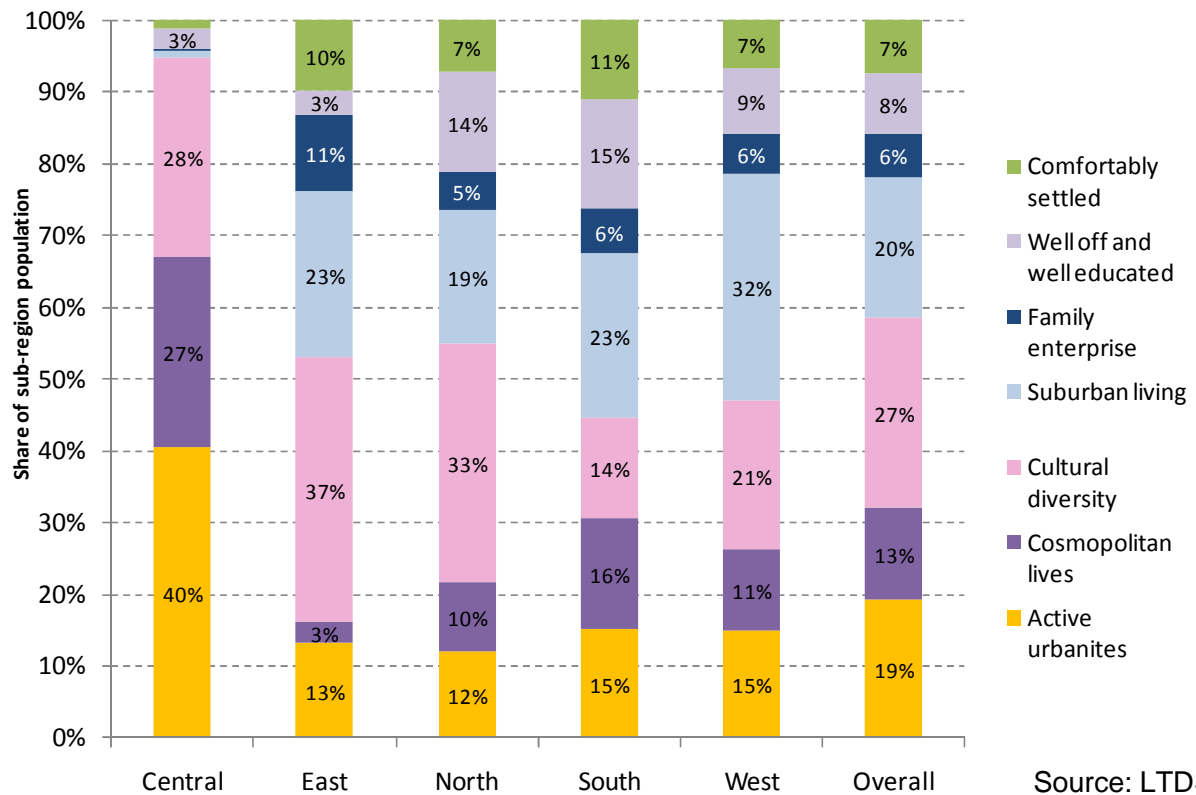


Source: LTDS 2008/9

London population shares

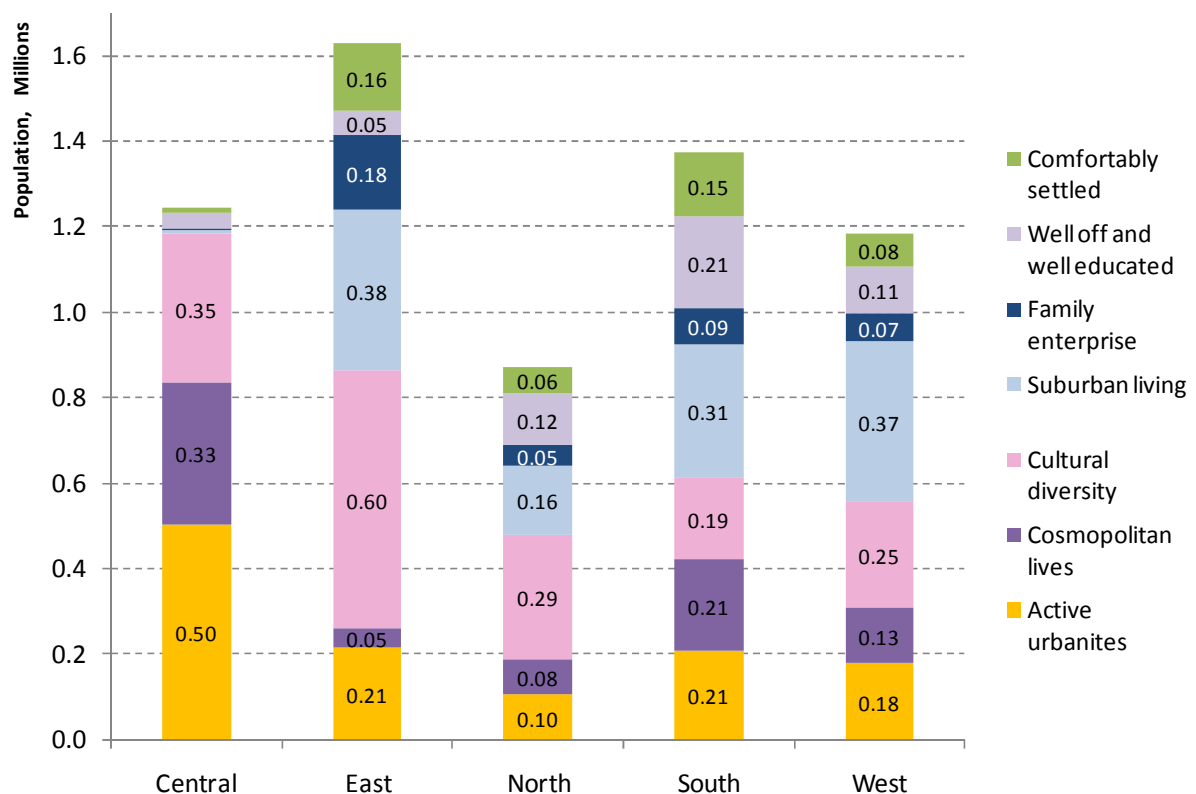
The segment population share and volume by sub-region are shown below.

Figure 7: London sub-region adult population shares by segment



Source: LTDS 2008/9

Figure 8: London sub-region adult population volumes by segment



Source: LTDS 2008/9

Demographics

- Some key demographics are compared below, covering income, car ownership, inner v outer location and ethnicity. In terms of income, for example, the two higher income segments are *Well off & well educated* and *Cosmopolitan lives*, while at the other end of the spectrum, the *Cultural diversity* and *Family enterprise* segments have below average incomes.
- Interestingly, while the *Cultural diversity* segment has below average income and correspondingly below average car ownership, the *Active urbanite* segment has the same lower level of car ownership but a slightly above average income, reflecting their lifestyle choices.

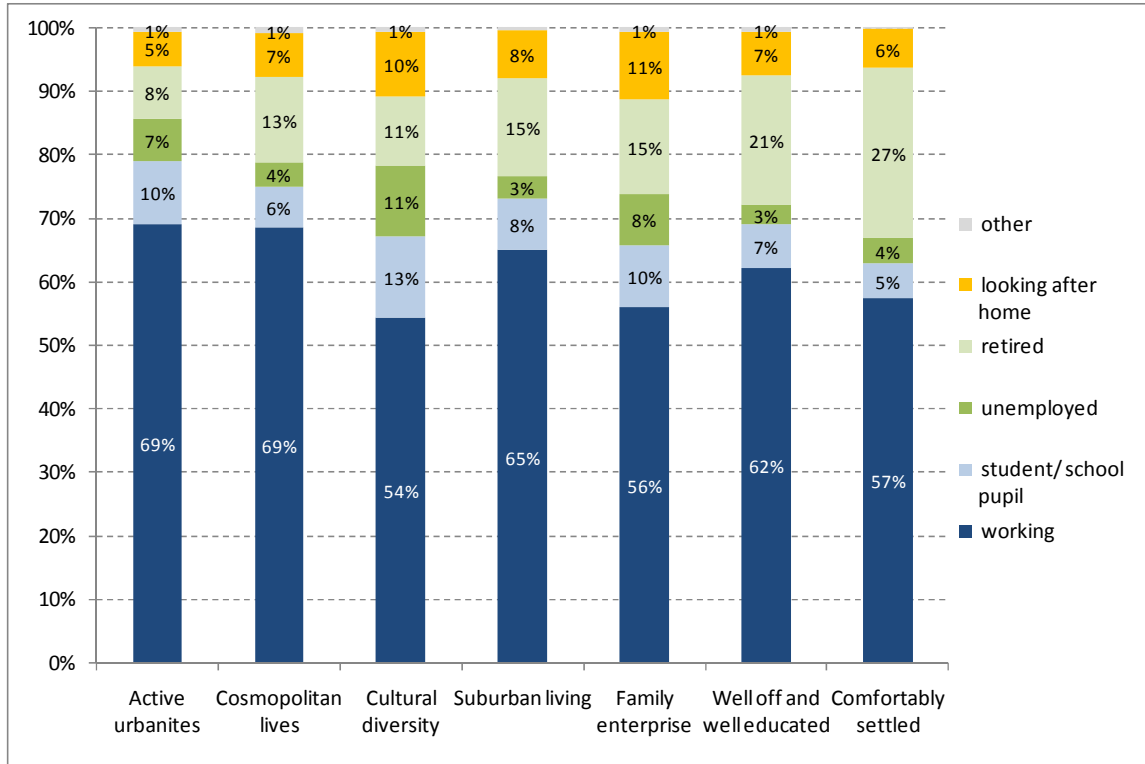
Name	Average household income	1+ car in household	Population in Outer London	Ethnicity
	£	% of segment households	% of segment population	% white population in segment
Active urbanites	42,000	49%	24%	74%
Cosmopolitan lives	55,000	72%	39%	85%
Cultural diversity	24,000	50%	42%	50%
Suburban living	37,000	82%	94%	66%
Family enterprise	28,000	73%	92%	75%
Well off and well educated	52,000	92%	86%	86%
Comfortably settled	31,000	79%	92%	85%
London average	37,000	67%	59%	70%

Source: LTDS 2008/9

Demographics: Working status & Lifestage

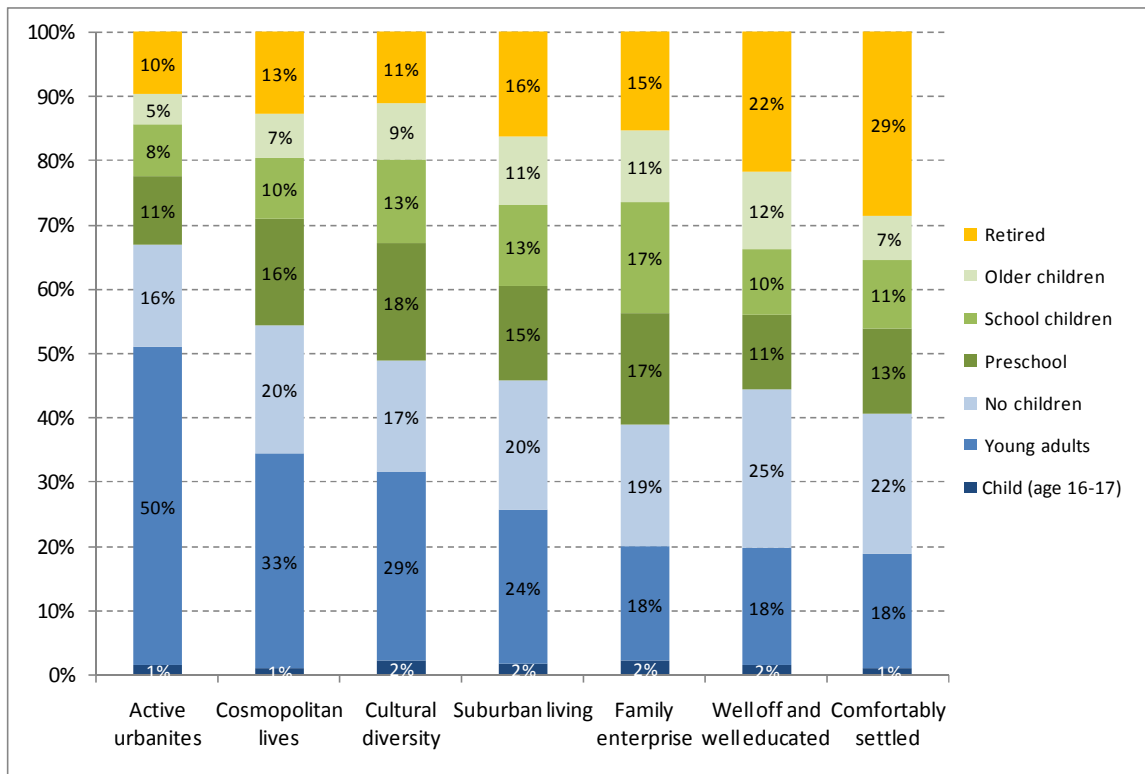
Comparisons of working status and lifestage are provided here. For example, this shows the *Active urbanites* segment has the highest proportion of young adults, while the *Comfortably Settled* has the highest proportion of retired.

Figure 9: working status profile of segments



Source: LTDS 2008/9

Figure 10: lifestage profile of segments



Source: LTDS 2008/9

In Fig 10, lifestage : Older children (12+), School children (5-11) and Pre school are the age of the youngest child in households with children. Retired is any adults over 65, rather than actual working status

Use of other modes

- The table below shows the relative use of different modes amongst each of the walking segments.
- For example, *Active urbanites* tend not to use car, but do use all other modes to an above average degree, reflecting their busy lifestyles.
- On the other hand, *Comfortably settled*, while driving more than average generally use other modes less than average (or average at best). This reflects the relatively high proportion of retired people in this segment.

Figure 11: Use of other modes

Segment (Share of population)	Car driver	Car passenger	Bus	Rail	Tube	Cycle for leisure	Cycle for a purpose	P2W	Walk (utility)
Active urbanites (18%)	well below	well below	well above	well above	well above	well above	above	above	well above
	average	average	average	average	average	average	average	average	average
Cosmopolitan lives (13%)	below	below	above	well above	well above	above	average	well above	above
	average	average	average	average	average	average	average	average	average
Cultural diversity (26%)	below	average	above	average	above	average	above	average	average
	average	average	average	average	average	average	average	average	average
Suburban living (21%)	well above	above	below	below	below	average	above	below	average
	average	average	average	average	average	average	average	average	average
Family enterprise (7%)	well above	well above	below	below	well below	below	above	below	below
	average	average	average	average	average	average	average	average	average
Well off and well educated (10%)	well above	well above	well below	below	below	well below	below	below	below
	average	average	average	average	average	average	average	average	average
Comfortably settled (7%)	well above	average	below	average	below	well below	below	below	below
	average	average	average	average	average	average	average	average	average

Key	well above	above	average	below	well below
	average	average		average	average
Index	>125	105-125	90-105	60-90	<60

Source: Segmentation survey 2009

Attitudes to modes

- On the following pages attitudes to various modes are presented, including car, bus, Underground, train, cycling and walking.
- Some notable points:
 - amongst the *Family enterprise* segment, car as driver is selected as the only method used by around a fifth of respondents.
 - *Cultural Diversity* are the most likely segment to say they would only use the bus because they have to.
 - Half of the *Well off and well educated* segment are happy to use the Underground, much higher than for other segments.
 - Cycling gets the largest shares of 'would never use' across all segments. *Well off and well educated* and *Family enterprise* are most likely to say this, while *Active urbanites* are most likely to say it is the only mode or the one they prefer to use, compared to other segments.
 - Walking has the most positive shares of attitudes of all the modes, with relatively large shares saying they prefer to use. This is particularly large for the *Cosmopolitan lives* segment. *Family enterprise* have the smallest share saying prefer to use or happy to use.
- The data in these charts excludes respondents who answered 'the only method of transport I ever use' to more than one mode.
- Following these charts are some showing attitudes to walking
 - *Cosmopolitan lives* tend to agree more than average to positive statements about walking, and conversely below average to the negative statements.
 - *Family enterprise* have almost the opposite views to *Cosmopolitan lives*, generally being negative towards walking.

Attitudes to modes: Car driver & Bus

Figure 12: Attitudes to car as driver by segment

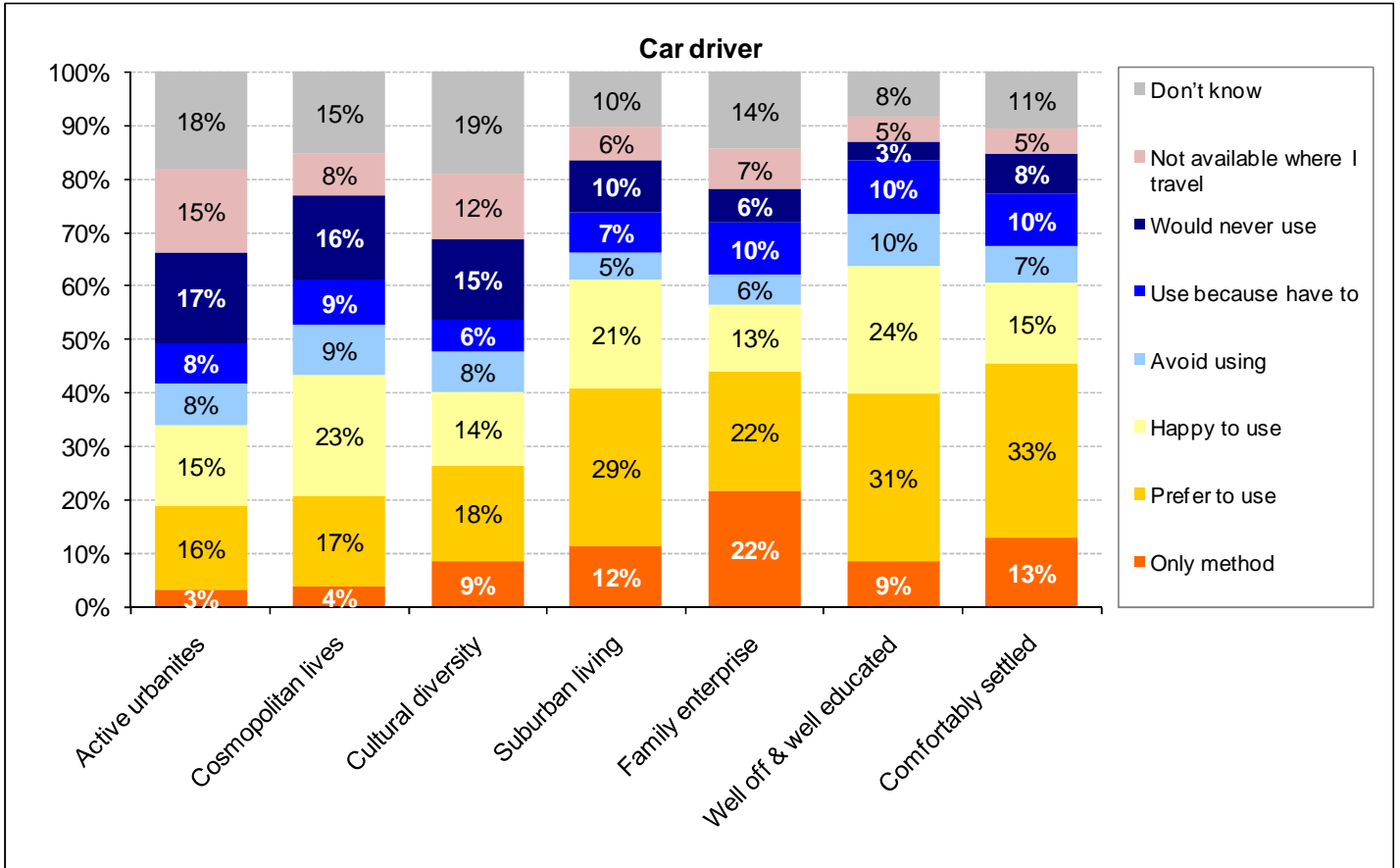
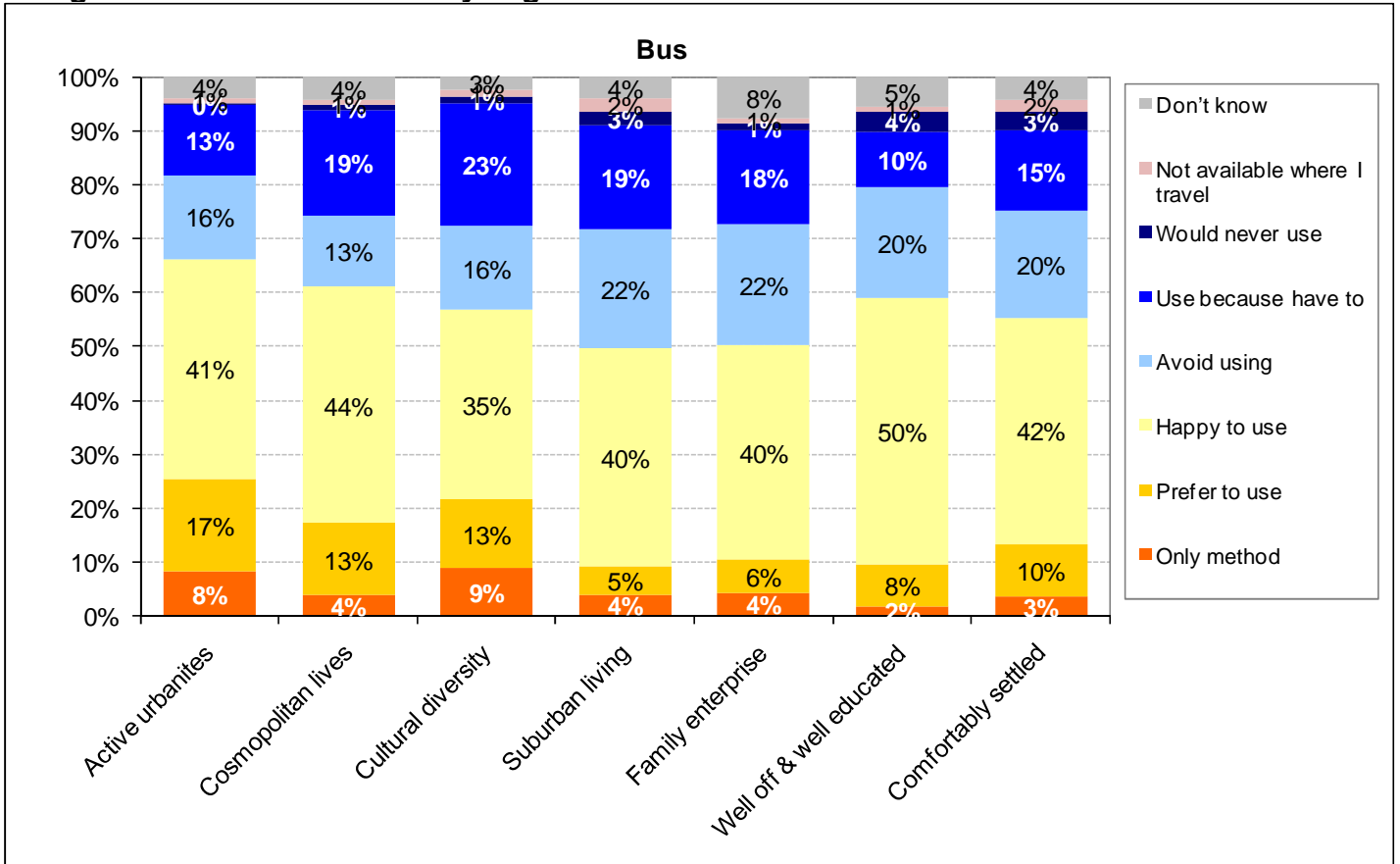


Figure 13: Attitudes to bus by segment



Source: Segmentation survey 2009

Attitudes to modes: Train & Underground

Figure 14: Attitudes to train by segment

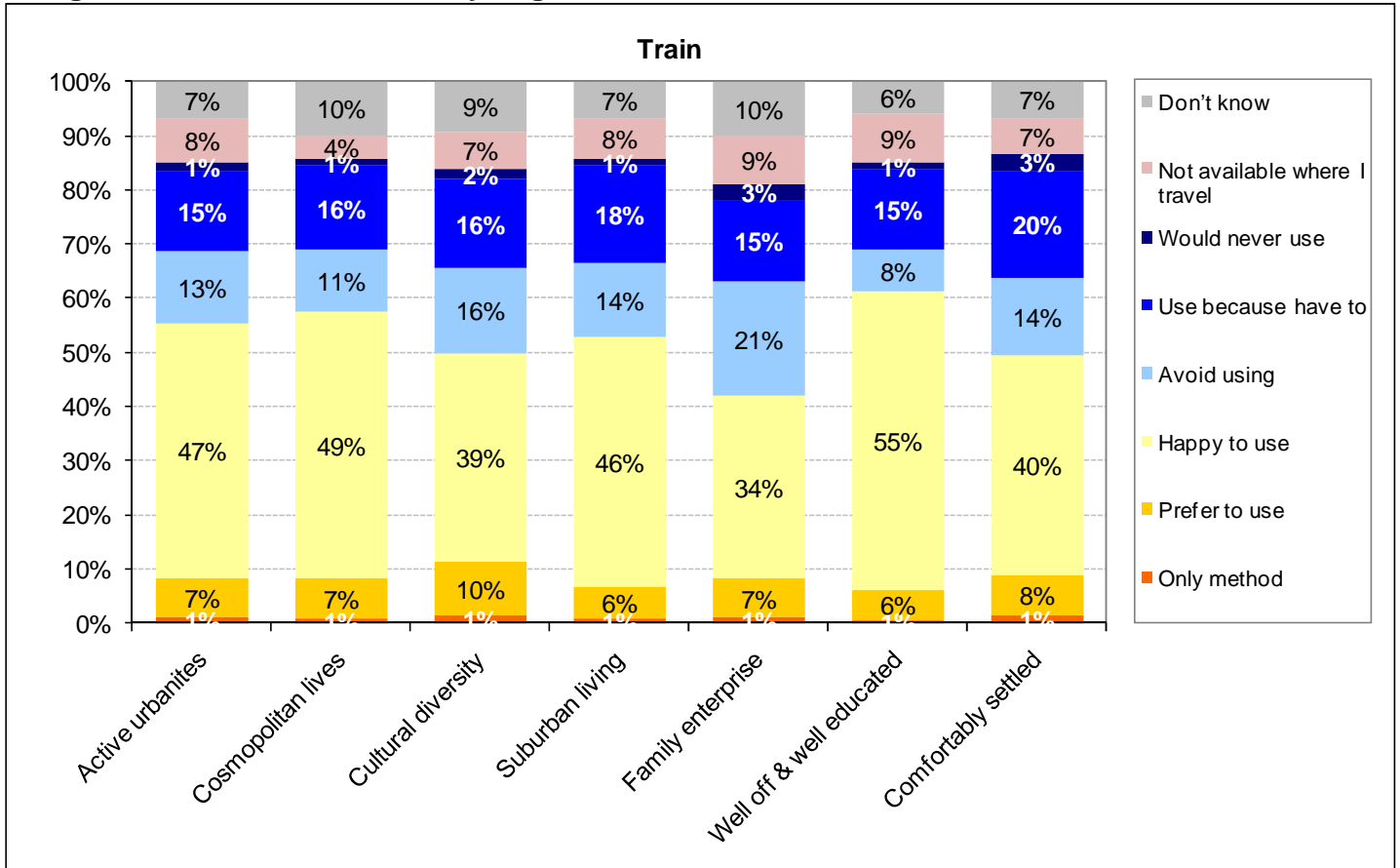
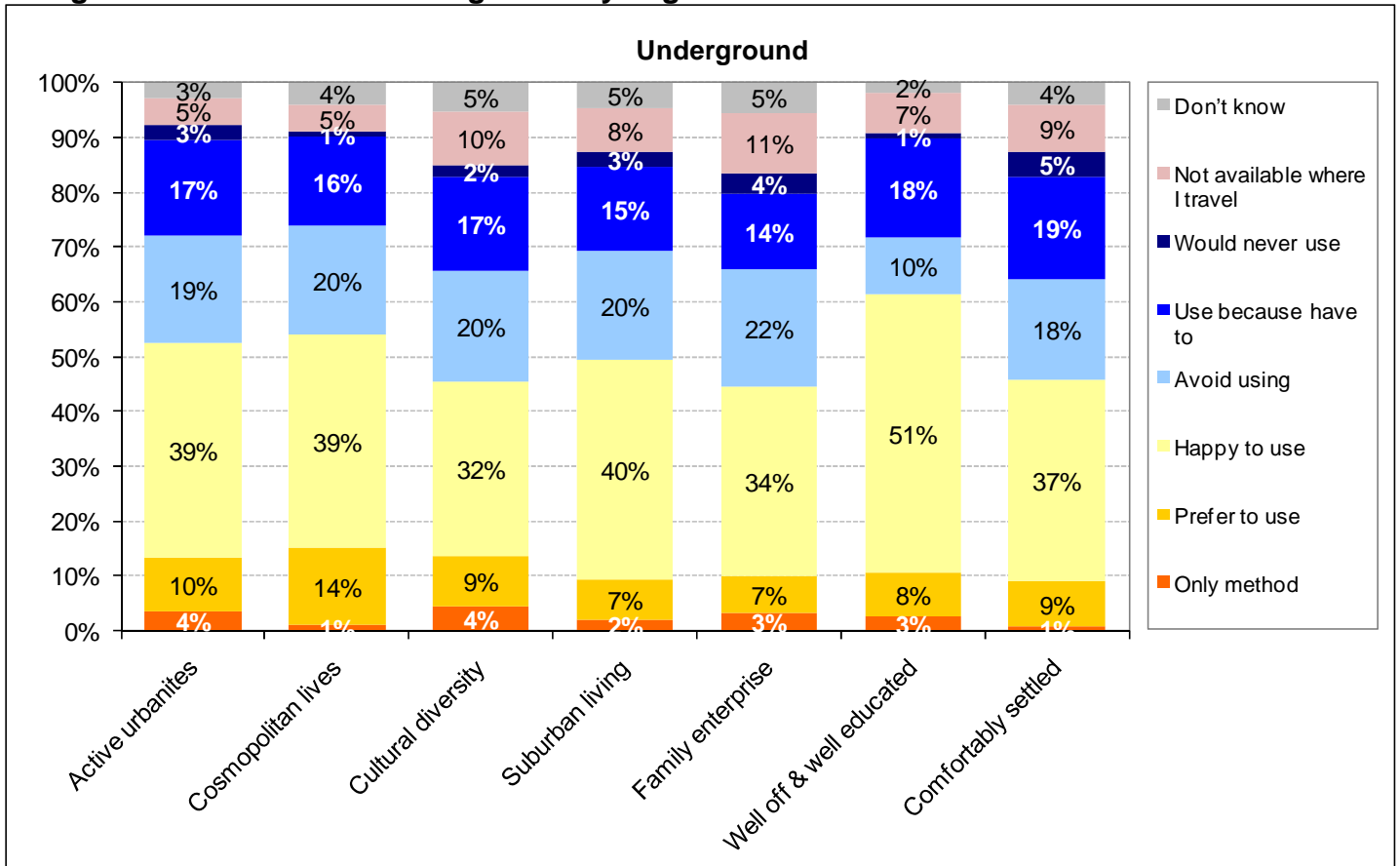


Figure 15: Attitudes to Underground by segment



Source: Segmentation survey 2009

Attitudes to modes: Cycling & walking

Figure 16: Attitudes to cycling by segment

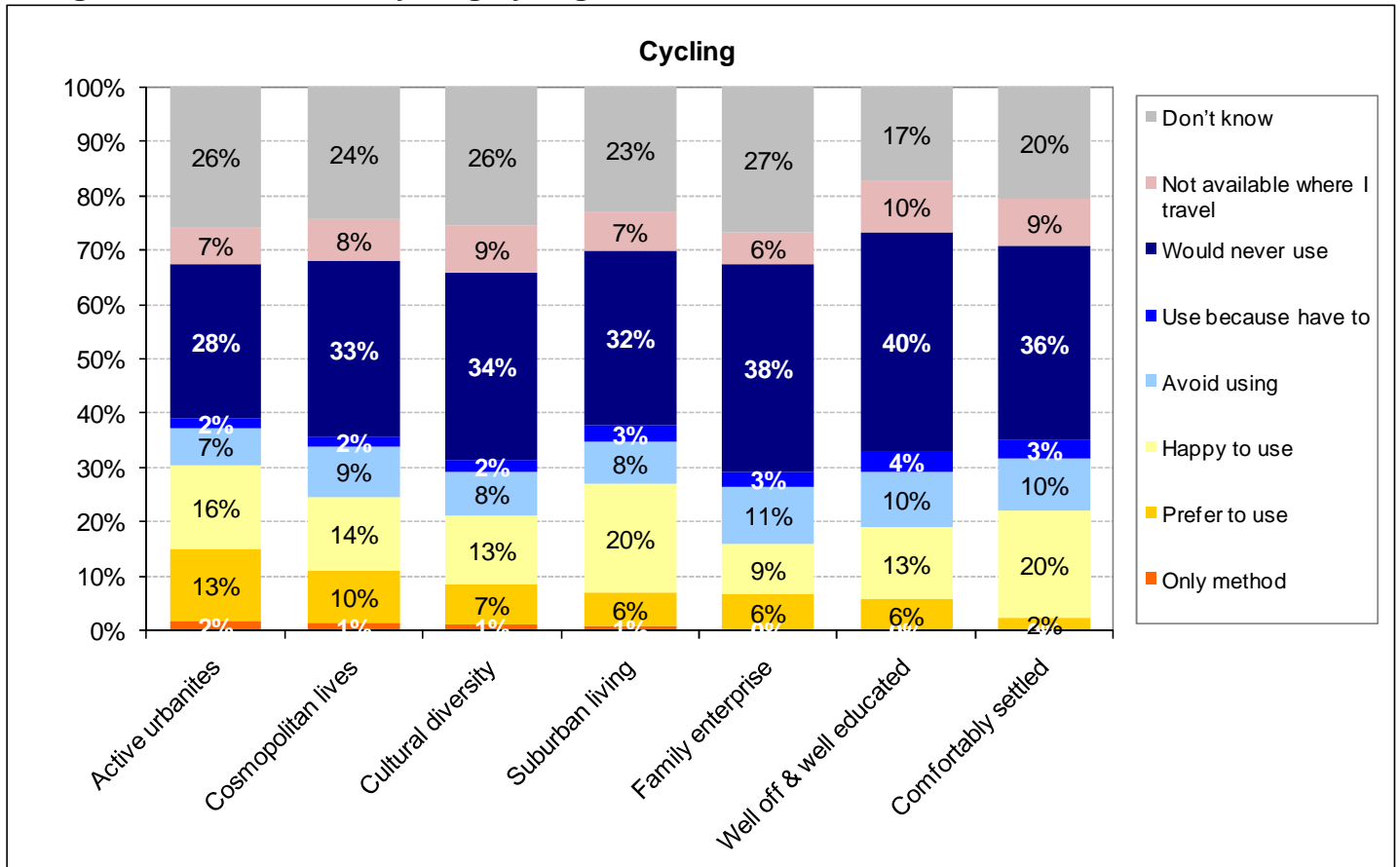
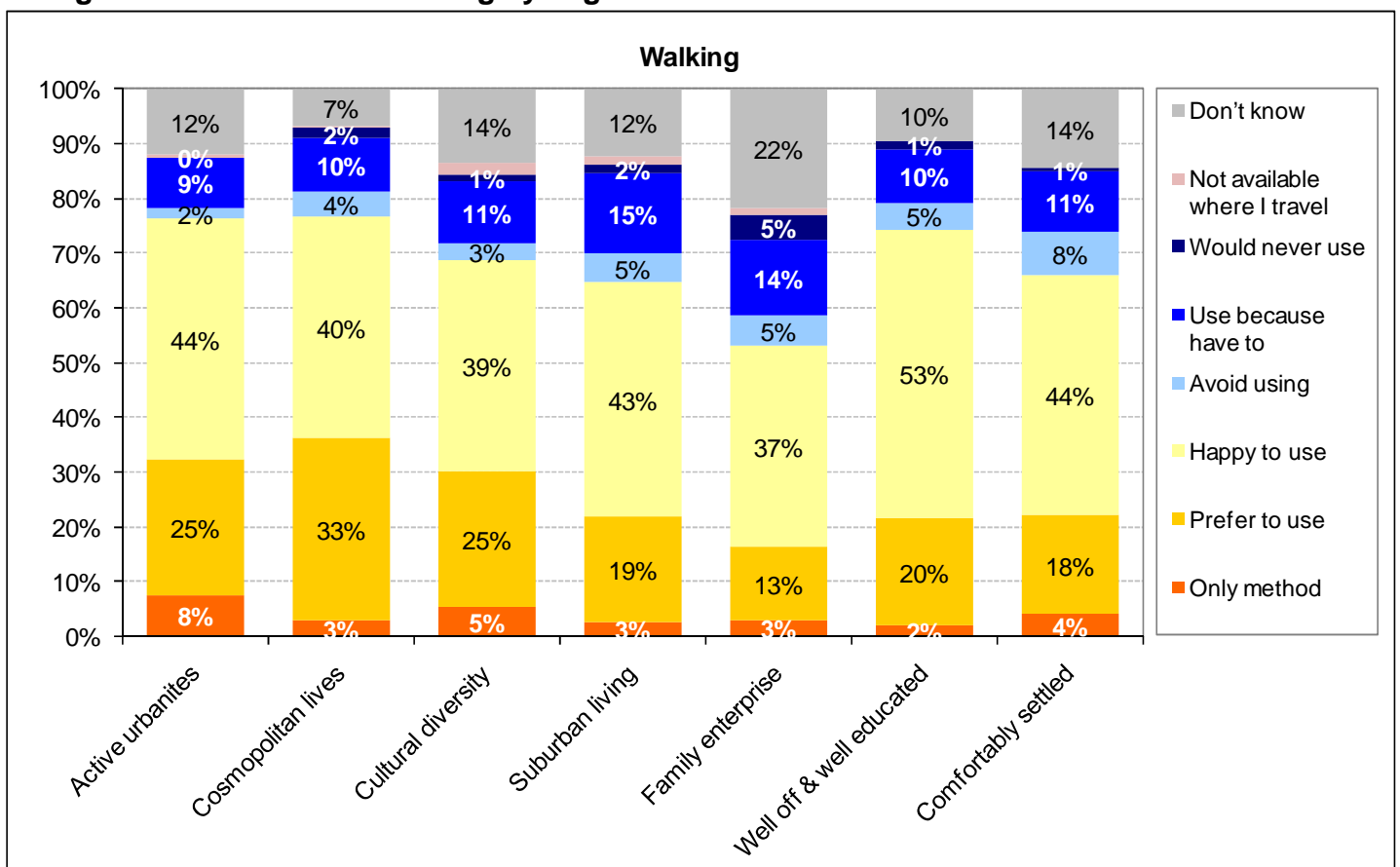


Figure 17: Attitudes to walking by segment



Source: Segmentation survey 2009

Attitudes to walking

Figure 18: Attitudes to walking by segment – positive statements

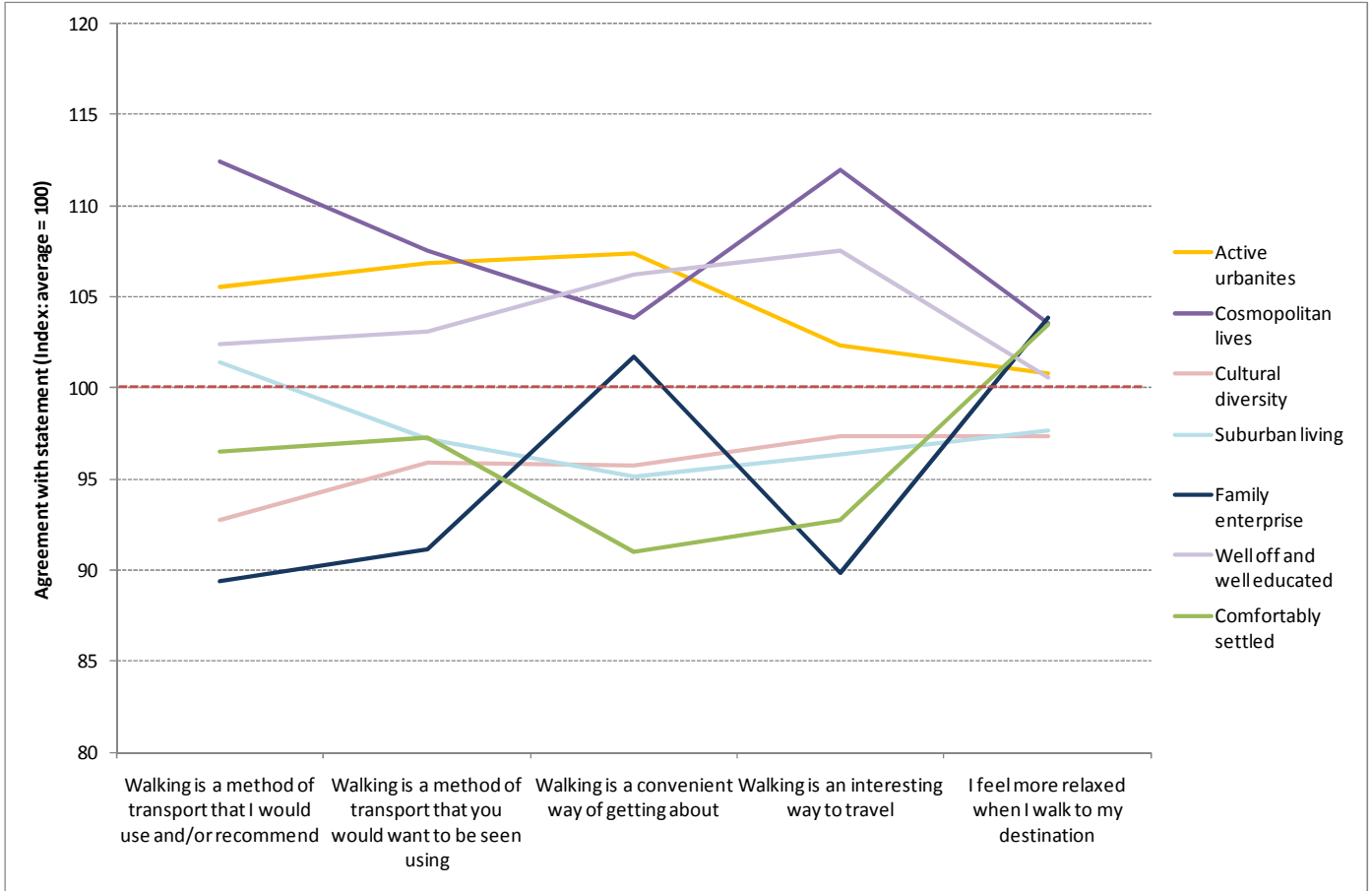
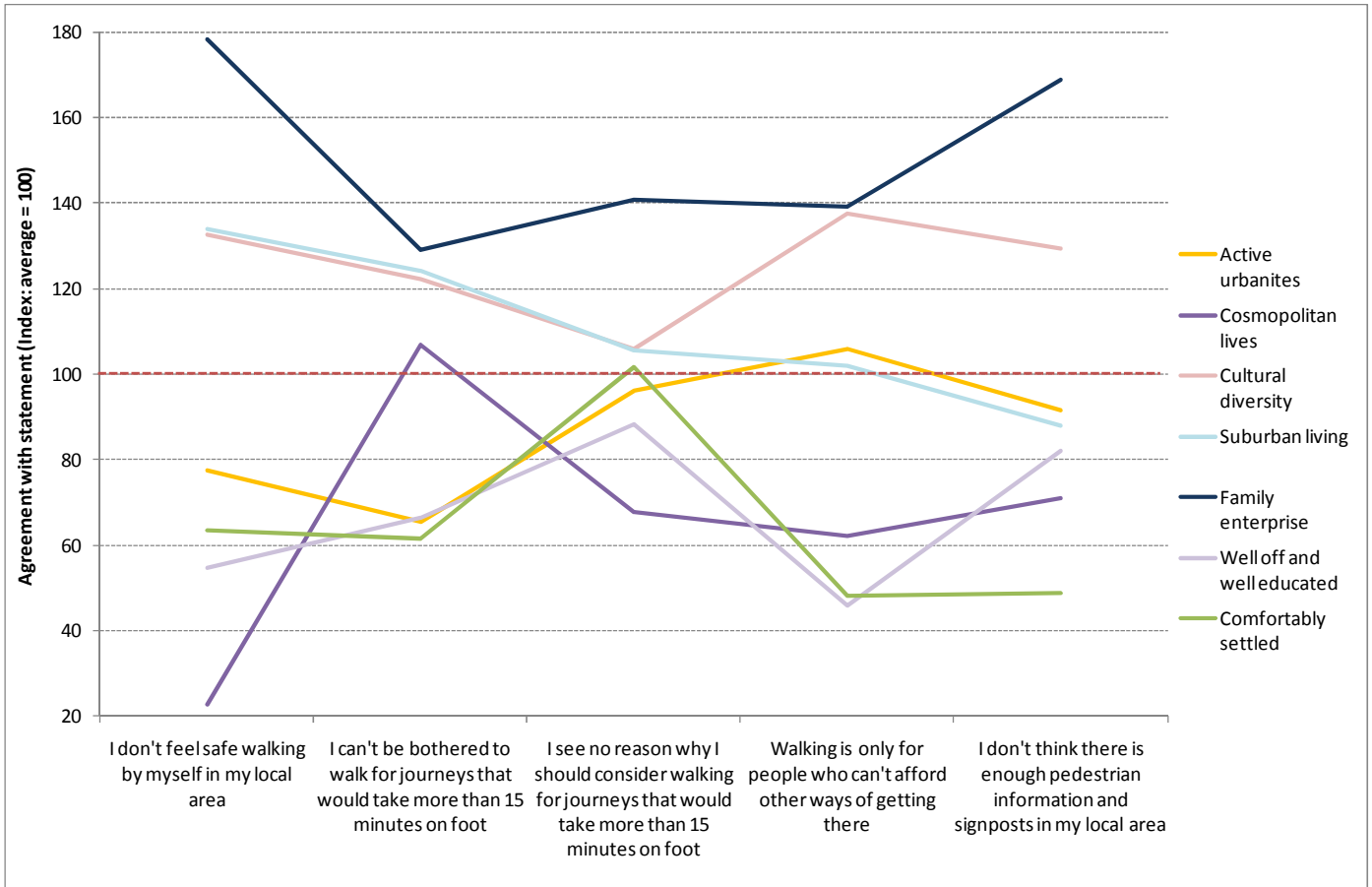


Figure 19: Attitudes to walking by segment – negative statements

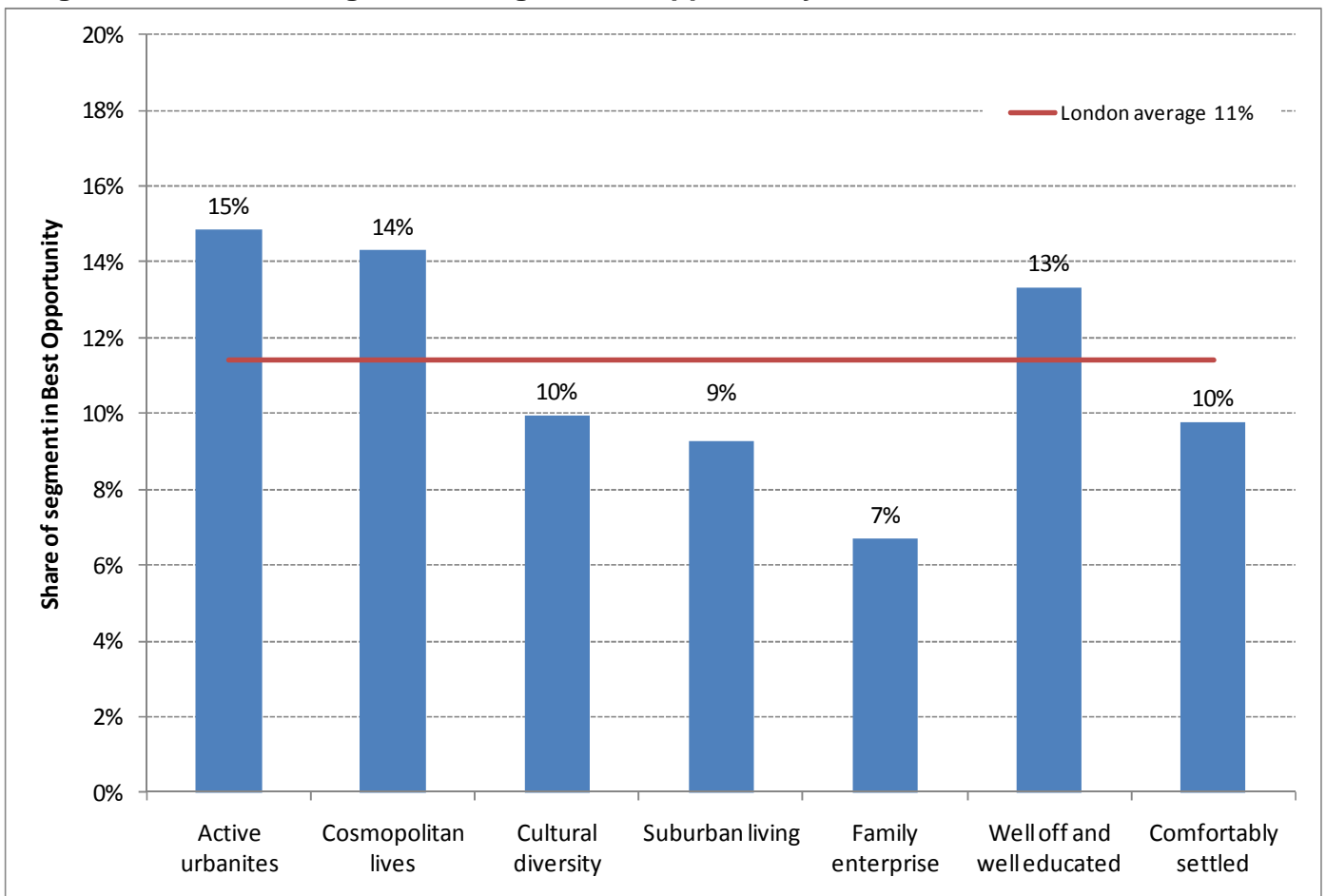


Source: Attitudes to walking 2010

Walking more - Best Opportunity

- The next few pages look at sources of data about the segments' willingness/likelihood to walk more.
- Firstly, a 'Best Opportunity' group has been designated, members of whom can be found in all the segments, but more so in the *Active urbanite*, *Cosmopolitan lives* and *Well off and well educated* segments.
- This categorisation uses data collected in the Segmentation survey. More information is available in the appendix.
- The Best Opportunity segment is based on the following:
 - A 'propensity score' is calculated from the stated expected change in use of a mode in the next year, and the image statements for modes, plus access to the mode.
 - High scoring respondents who also fall in the Primary Opportunity segment are selected as being the 'Best Opportunity'.
- The chart below (Figure 20) relates this analysis to the new Walking segments, looking at the share of Best Opportunity in each segment.

Figure 20: Share of segment falling in Best Opportunity



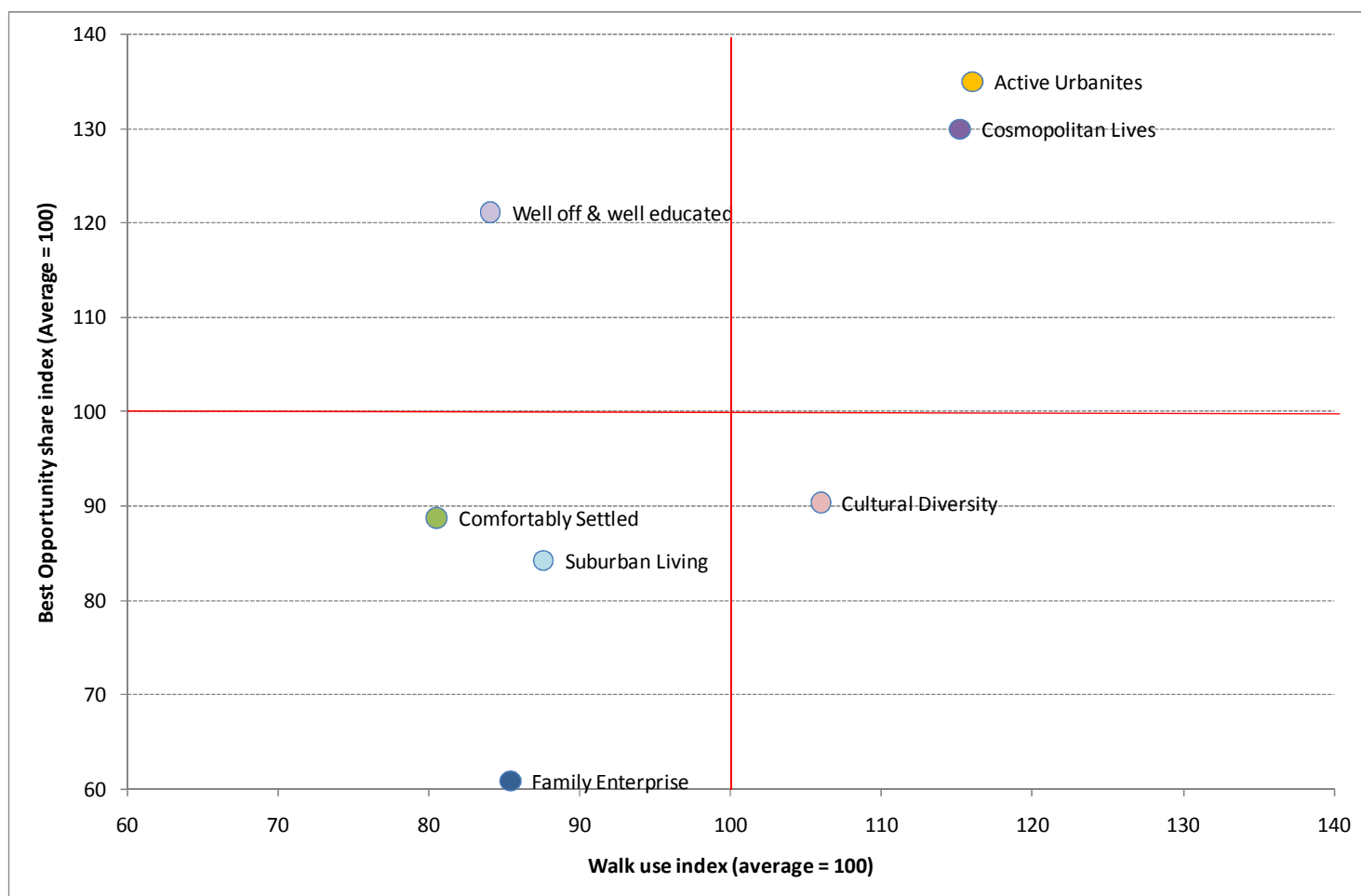
Source: Segmentation survey 2009

Equivalent population (000s)	180	116	167	116	25	71	45
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Walking more - Best Opportunity

- Comparing current behaviour and the share of Best Opportunity, as in the chart below, provides an indication of the groups amongst whom the greatest potential for walking could be seen, if those in the Best Opportunity group walked more.
- Those in the segments in the top right sector (*Active urbanite*, *Cosmopolitan lives*) generally walk more than average, and also have a larger than average share of people in the Best Opportunity group. This would imply these two segments are key targets.
- The segments in the bottom left sector walk less than average and have below average shares in the Best Opportunity group, giving them more limited potential.
- The segment in the top left quadrant (*Well off and well educated*) is characterised by having an above average share of Best Opportunity, but below average current walking.

Figure 21: Best Opportunity vs. current walking behaviour

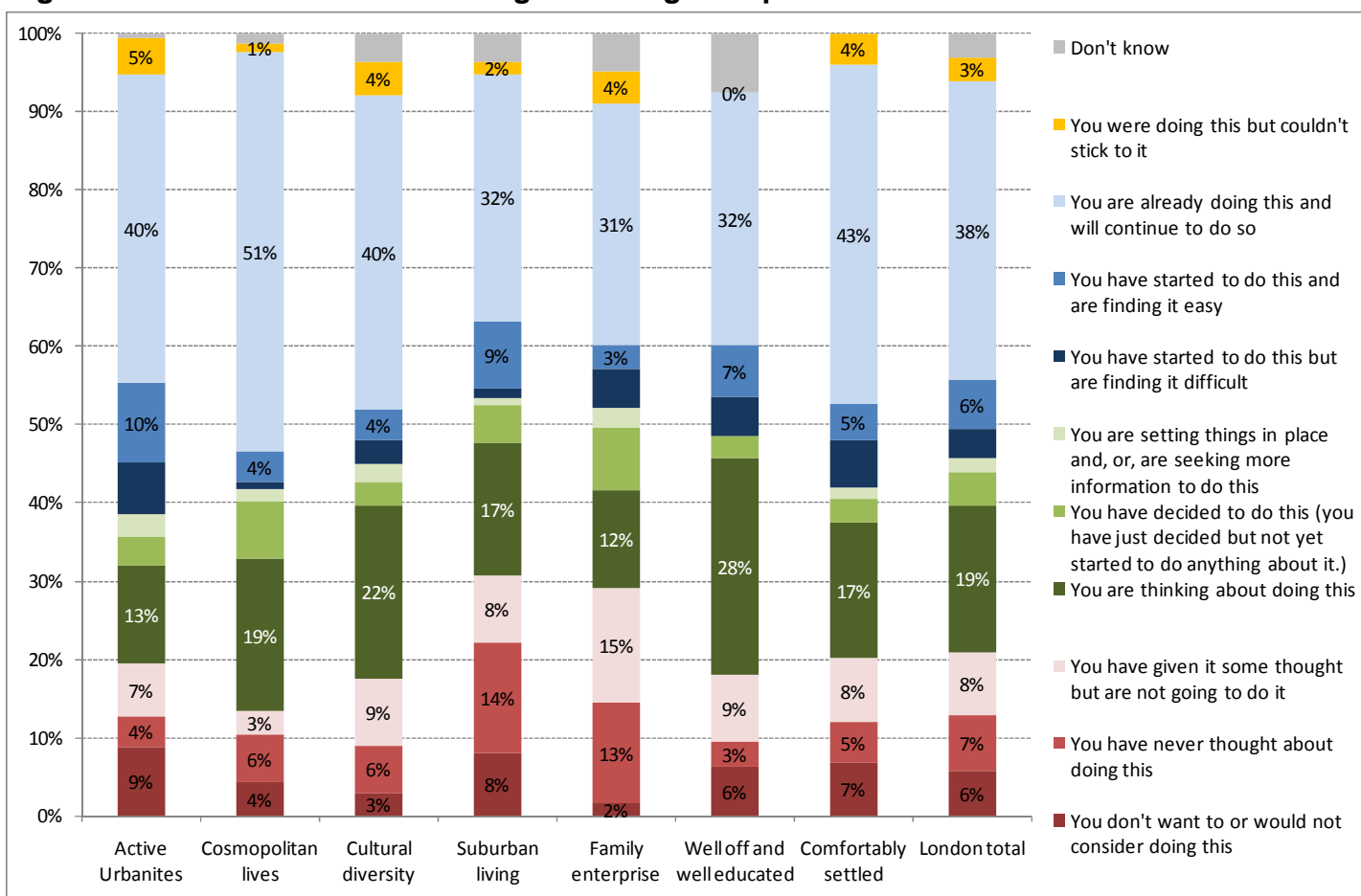


Source: Segmentation survey 2009

Walking more - Attitudes survey

- Respondents in the Attitudes to walking survey were asked “Thinking about the possibility of ‘Walking more’, which of these descriptions would you say most applies to you?”
- The following chart shows the differences in response by segment, and the table summarises this same information into four broader categories.
- The key finding from this is that *Suburban living* are less likely to have considered walking more, while *Well off & well educated* are most likely to be thinking about it. It is the *Active urbanites* and *Cosmopolitan lives* which are most likely to have already started walking more.

Figure 22: Consideration of ‘walking more’ segment profiles



	Active Urbanites	Cosmopolitan Lives	Cultural Diversity	Suburban Living	Family Enterprise	Well off & well educated	Comfortably settled
Doing but couldn't stick to it	5%	1%	4%	2%	4%	0%	4%
Started to/ doing already	56%	56%	47%	41%	39%	44%	54%
Considered	19%	28%	27%	23%	23%	30%	22%
Not considered	19%	13%	18%	31%	29%	18%	20%

Source: Attitudes to walking survey 2010

Walking more - key messages

- The attitudes amongst the Best Opportunity group have been analysed to assess which messages may be key in attracting more walking.
- The top 5 statements (in terms of the highest proportion agreeing across the whole Best Opportunity group) are:
 - Good for getting some exercise
 - Environmentally friendly
 - Enjoyable way of getting about
 - Good value for money
 - Relaxing
- The table below shows these five statements in order of the difference between the average level of agreement and the agreement by the Best Opportunity part of the segment.
- Those attitudes at a higher rank are likely to be influential amongst the Best Opportunity segment.
 - For example, the environment is a more positive message amongst those most likely to change in the *Comfortably settled* segment, compared to other segments.

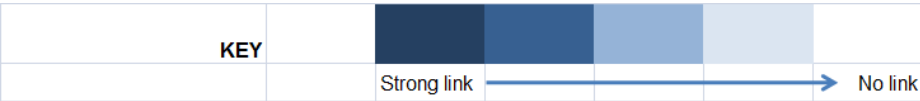
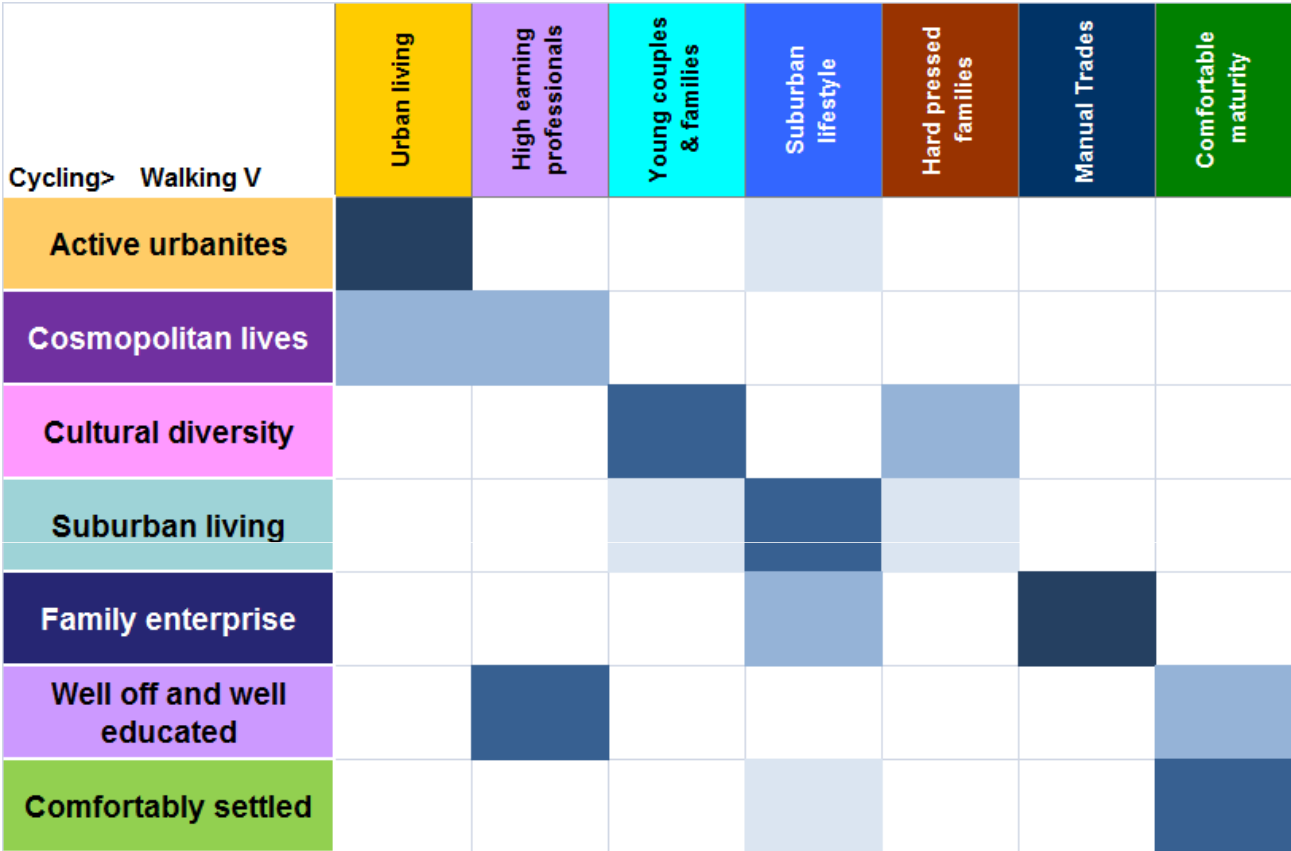
Rank	Relaxing	Enjoyable way of getting about	Good value for money	Environmentally friendly	Good for getting some exercise
Active urbanites	1	3	2	4	5
Cosmopolitan lives	3	1	2	4	5
Cultural diversity	3	1	2	4	5
Suburban living	3	1	2	4	5
Family enterprise	2	1	3	4	5
Well off & well educated	1	2	3	4	5
Comfortably settled	1	4	3	2	5

Source: Segmentation survey 2009

Relationship between walking and cycling segments

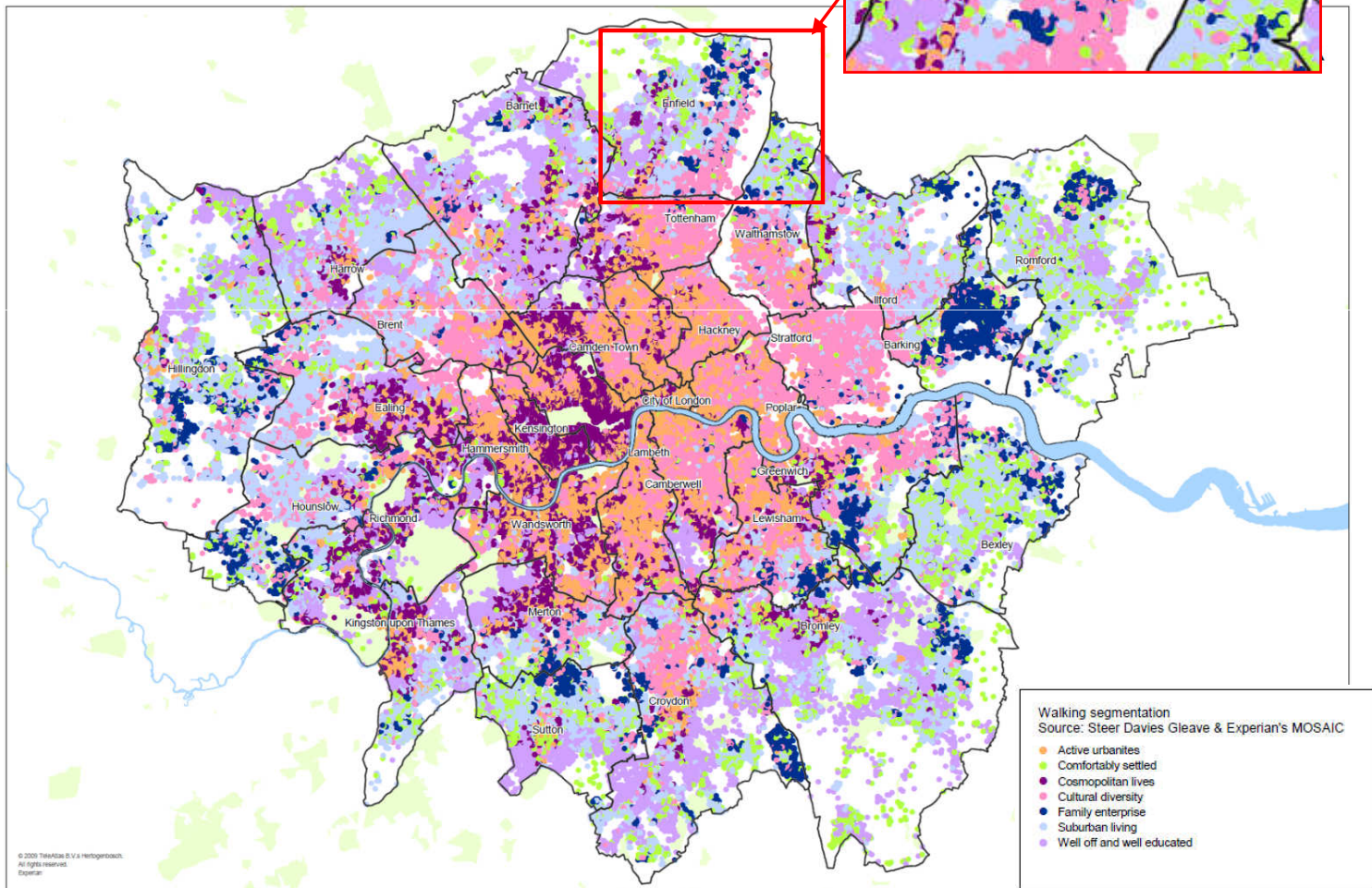
- The diagram below aims to show the relationship between the Walking segmentation and the MOSAIC Cycling segmentation which preceded it. Both segmentations are based on MOSAIC so the correspondence is based on the extent to which the same MOSAIC Types are included in the two segmentations.
- For example, the *Active urbanite* and *Urban living* segments are closely related because they both include the City Adventurers MOSAIC Type. In fact, the difference between them is that the walking segmentation segment, *Active urbanite* is more narrowly defined with one of the important MOSAIC Types included in the *Urban living* cycling segment (New Urban Colonists) placed in the *Cosmopolitan lives* walking segment, due to the walking behaviour of this MOSAIC Type.

Figure 23: Strength of relationship between walking and cycling segments



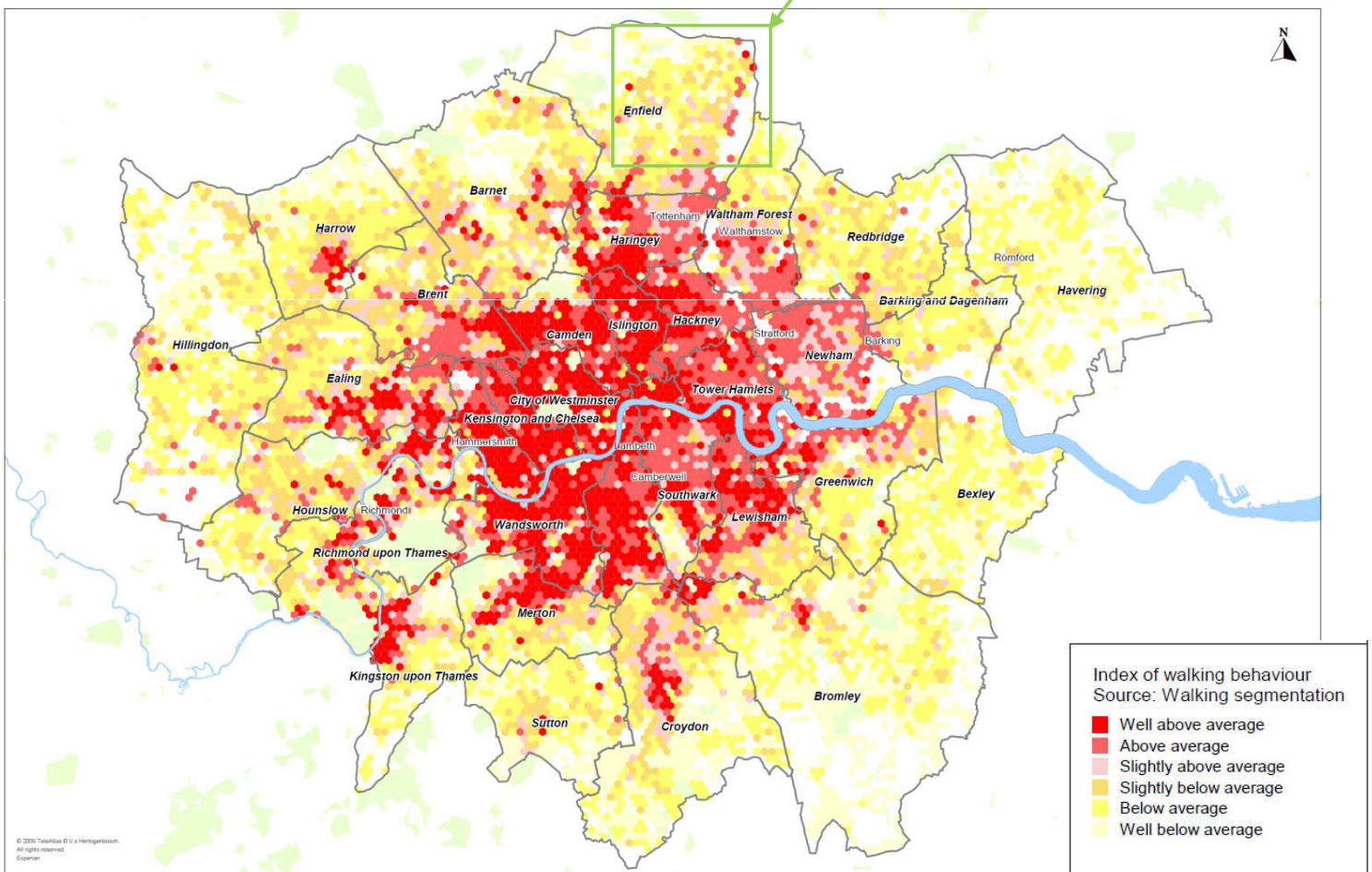
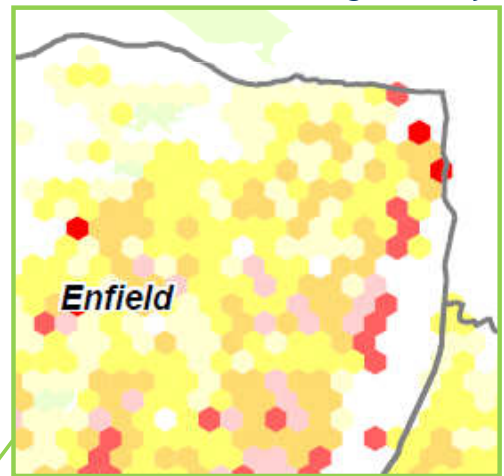
Walking segment profile map

- The MOSAIC Walking profile map shows the distribution of the segments across London. It shows every postcode in London colour-coded to reflect the segment it belongs to. It provides an instant overview of the nature of an area in terms of the type of people who live there, and whether they are the type of people who walk a lot or a little.
- This map can provide an overview of a wide area (such as a sub region) or to zoom into a smaller area. In either case, it is possible to see the general pattern of which are the dominant segments in an area, but also whether there are any clusters or hotspots of a particular segment.
- For example, the area to the north east of Enfield shown opposite shows distinct neighbourhoods of *Cultural diversity*, and *Suburban living*, with small islands of *Family enterprise*. *Comfortably settled* postcodes are seen in the less densely populated part of the area.
- Towards Central London, more *Cultural diversity* and *Active urbanite* postcodes can be seen. *Cosmopolitan Lives* are more likely to be seen in the central and west parts of London.



Walking behaviour map

- The MOSAIC Walking behaviour map shows the relative amount walking across London, based purely on the population profile (i.e. not considering where the walks themselves take place or population density). The red areas (hexcells) are those who would be expected to walk more than average, while the light yellow are below average.
- This has been calculated by analysing the number of people from each segment living within a 200m wide hexcell, weighted by the relevant walking Behaviour Index. The Index is displayed for each segment in the next section, and is based on the mean stages walked per day by members of the segment.
- In the example map of the Enfield area, the map indicates the area has generally below average potential, though with the exception of a corridor at the eastern edge, and a few other hotspots, due to the locations of *Cultural diversity* and *Active urbanite* postcodes, as seen on the previous map.
- The London-wide map shows a general picture of the more centrally located population more likely to walk, than those in the suburbs. Though some of the Outer London town centres are highlighted as exceptions.



Explanation

Current walking index

This identifies the relative average current walking behaviour amongst those in the segment. 100 is the London average, an index of 50 would mean those in the segment walk half as many stages per day compared to the average.

Short overview of the segment and key characteristics

% of London pop

The pie chart here shows the % of the London population which falls into the segment being described.

MOSAIC Types

Here the key MOSAIC Types which make up the population of the segment are identified and illustrated using a picture-board and summary description taken from the MOSAIC e-brochure .

This map illustrates the distribution of the segment across London. Each symbol on the map represents one postcode (the average population of a postcode is 15, though it can be higher in densely populated urban areas and lower in rural areas).

This chart shows how the population is split between Inner and Outer London

% of sub-region population

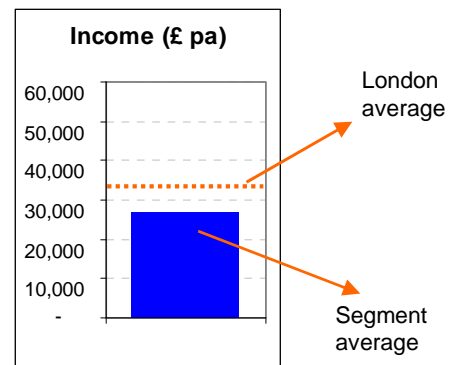
This chart shows the proportion of each sub-region's population which falls into the segment being described.

Demographics

Age, Ethnicity, Income, Cars

The segment is profiled here on four key variables. For example, it shows what proportion of the segment's population is aged under 35, 35-54 and 55+. Household income is shown as an average, with the London-wide average also shown as a dotted line.

The source of this data is LTDS



Frequency of walking

Walk stages per day & km walked per day

The average frequency of walk stages per day is shown. The overall average for London is also identified.

The average km walked per stage is also shown.

The source for both charts is LTDS.

Lifestage

Population share by lifestage

Lifestage has been defined for every adult in LTDS based on the presence of children and age.

The definitions are: Child - aged <18, No children - aged 45-64 no children in household, Older children – youngest child in household aged 12-17, School children – youngest child in household aged 5-11, Preschool – youngest child in household aged <5, Retired – aged 65+ no children in household, Young adults – aged 18-44 no children in household

Use of transport modes

This shows the segment's propensity to use different transport modes. The source is the 2009 Segmentation study, and it is based on the average days per week each mode is used, calculated as identified above. The thresholds for the 5 categories used are:

Well above average=more than 25% above average; above average=5% to 25% above average; below average=60-90% of the average; well below average=less than 60% of the average days per week.

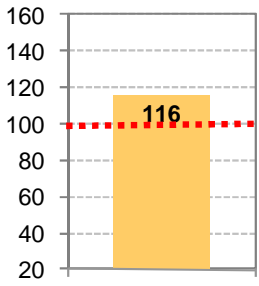
Attitudes to walking

The % of respondents agreeing that various statements apply to walking in the Attitudes to Walking survey (2010) is provided here. The responses are colour-coded as follows:

Well below average	At least 25% less than average
Below average	25 – 10% less than average
Average	10% less to 10% more than average
Above average	10% - 25% more than average
Well above average	At least 25% more than average

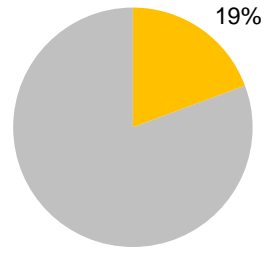
Active Urbanites

Current walking index



Active Urbanites are a prime target for walking. They tend to be quite young, well educated and reasonably well-off. They have very busy lifestyles and usually live close to town / city centres. Many choose to live without a car.

% of London pop



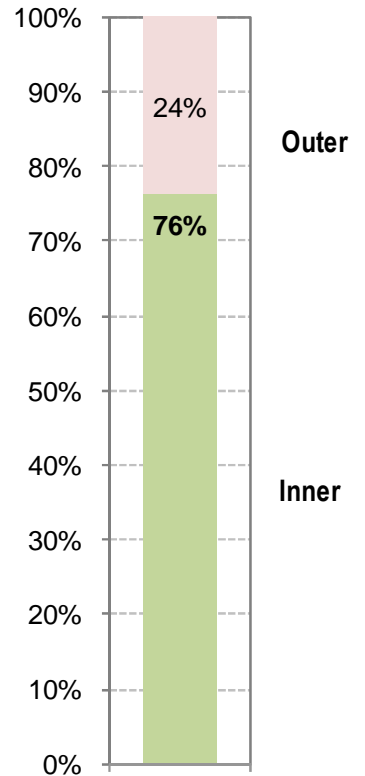
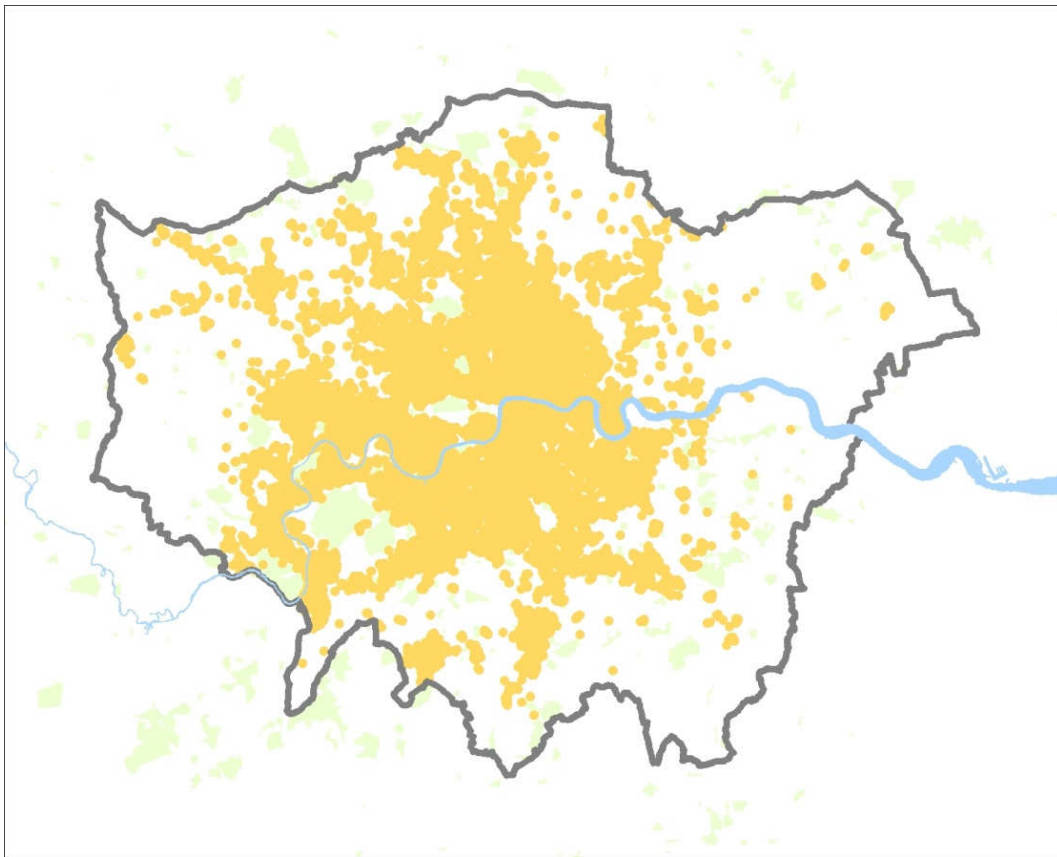
City Adventurers

High-salaried, twenty-something singles in smart flats in inner urban areas.

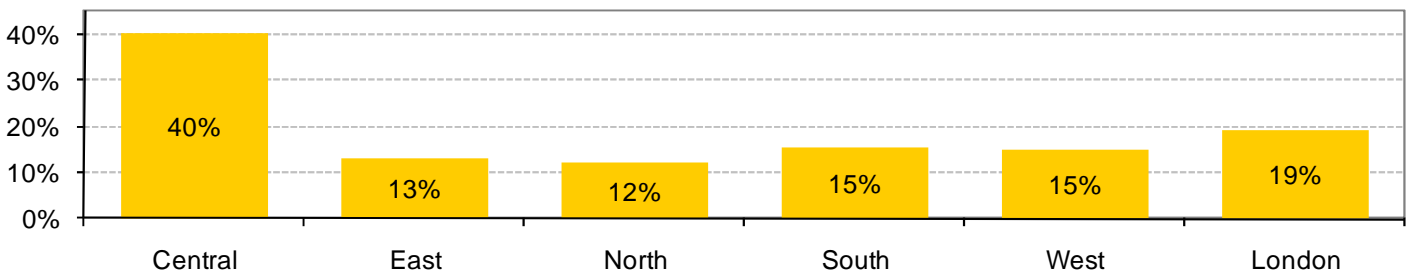


Counter Cultural Mix

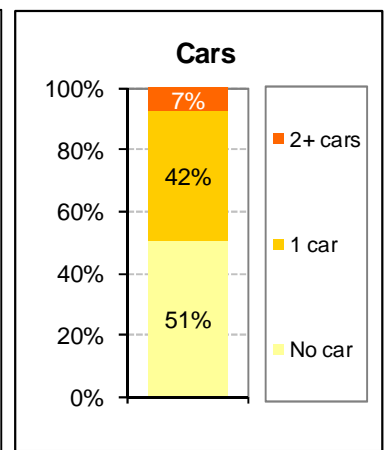
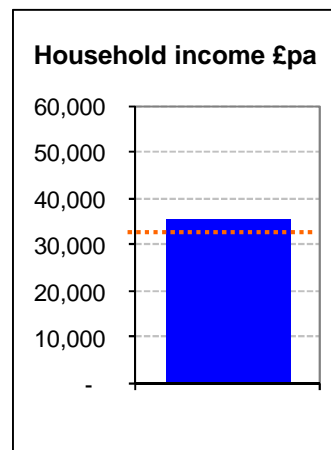
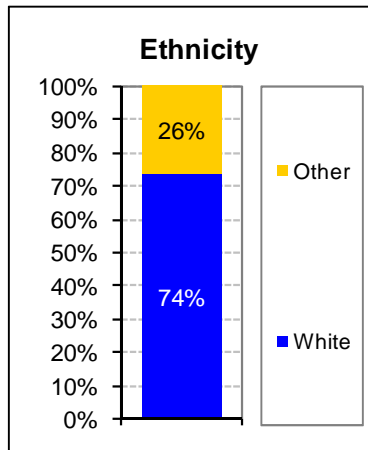
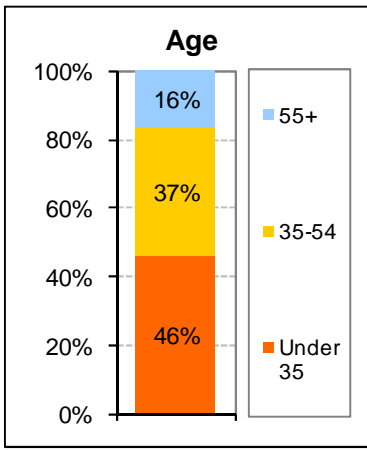
Young, mobile population in a mix of jobs either in the service economy or in professional employment, in run-down urban areas.



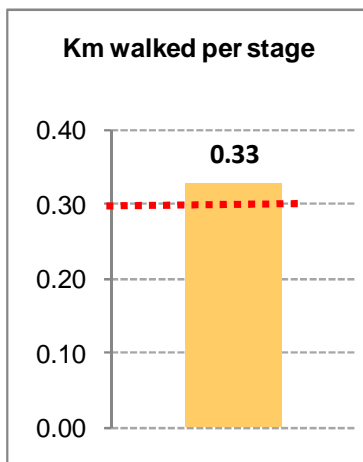
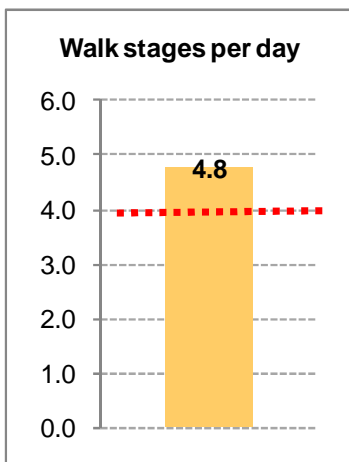
% of sub-region population



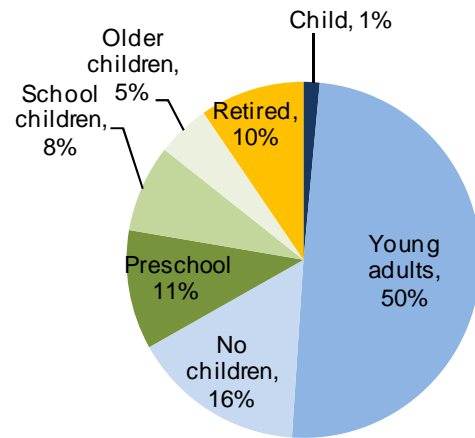
Demographics



Frequency of walking



Lifestage



Use of transport modes

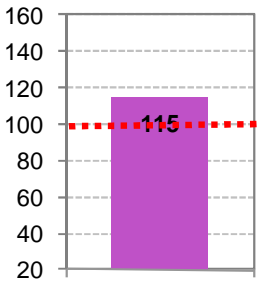
Car driver	Car passenger	Bus	Rail	Tube	Cycle for leisure	Cycle for a purpose	P2W
well below average	well below average	well above average	well above average	well above average	well above average	above average	above average

Attitudes to walking (% agree)

Traffic fumes make people dislike walking on London streets	65	I can't be bothered to walk for journeys that would take more than 15 minutes on foot	19
London is a city for walking	65	I see no reason why I should consider walking for journeys that would take more than 15 minutes on foot	35
I don't feel safe walking by myself in my local area	15	Walking is only for people who can't afford other ways of getting there	16
Dirty and vandalised streets make people dislike walking in London	80	I don't think there is enough pedestrian information and signposts in my local area	30

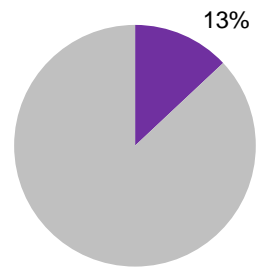
Cosmopolitan Lives

Current walking index



Cosmopolitan Lives are affluent professionals living and working in central locations. They enjoy a cosmopolitan lifestyle, and use a variety of transport modes to get around, including walking.

% of London pop



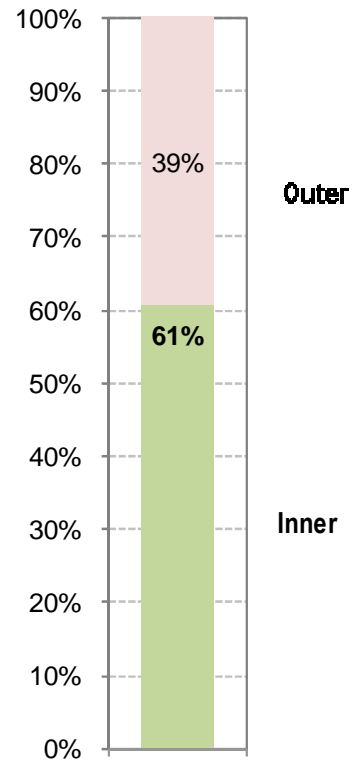
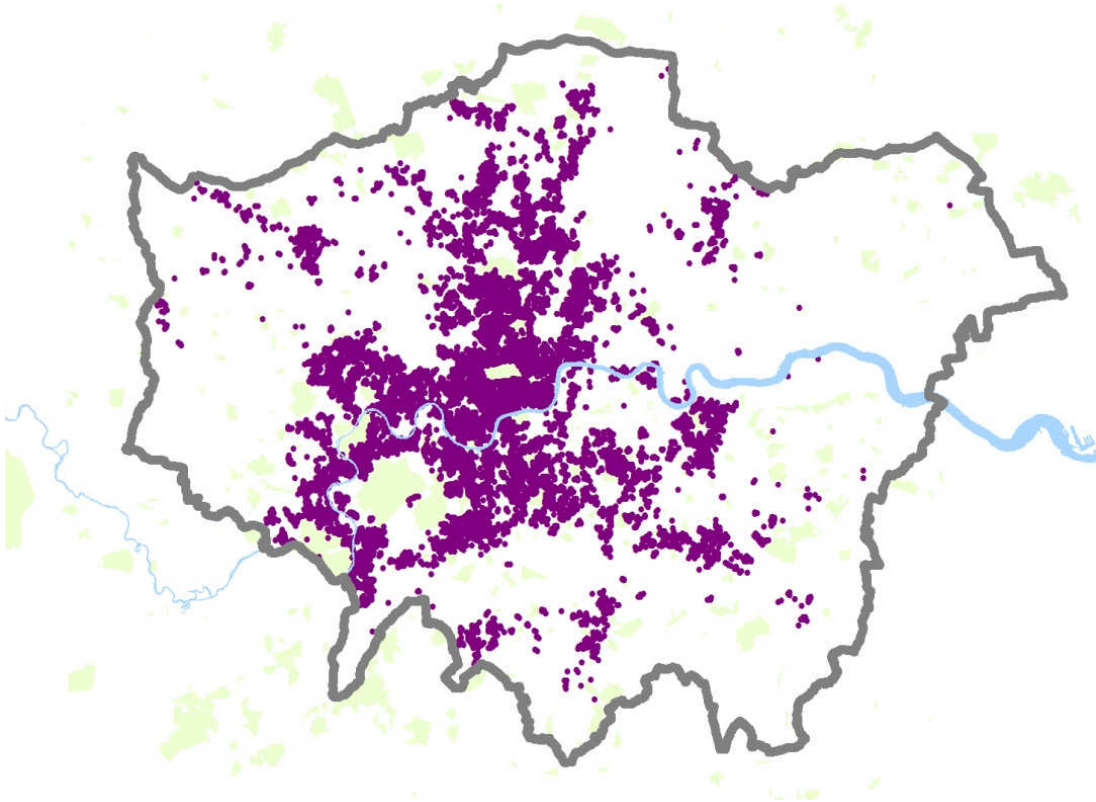
Global Connections

Very affluent, cosmopolitan sophisticates found in extremely expensive housing.

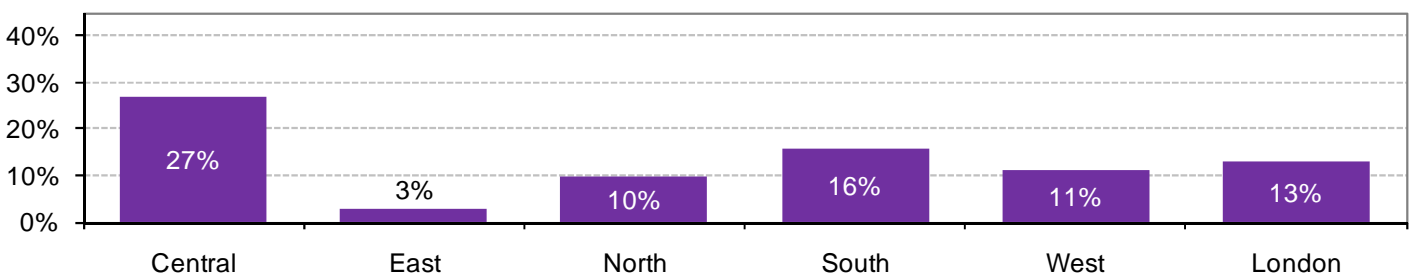


New Urban Colonists

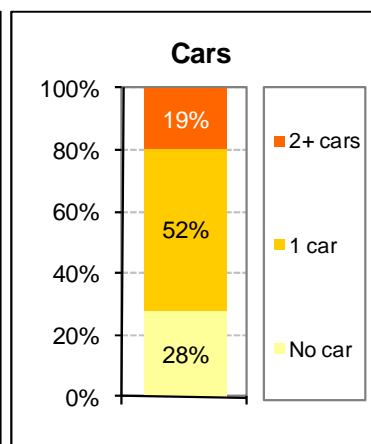
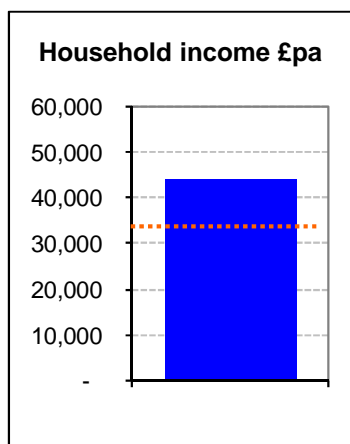
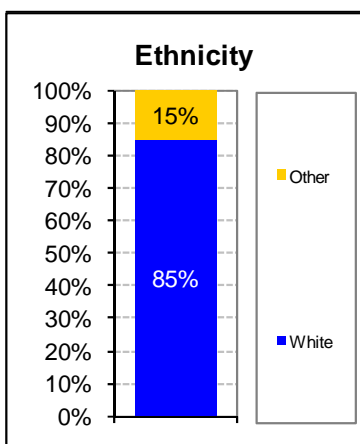
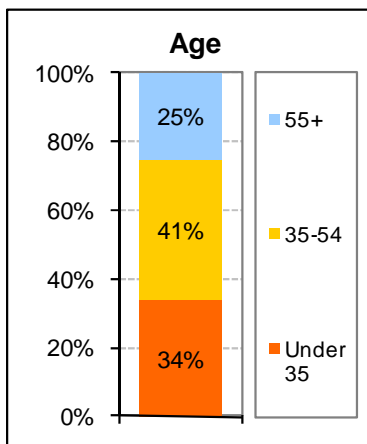
Younger, high-achieving professionals, enjoying a cosmopolitan lifestyle in a gentrified urban environment.



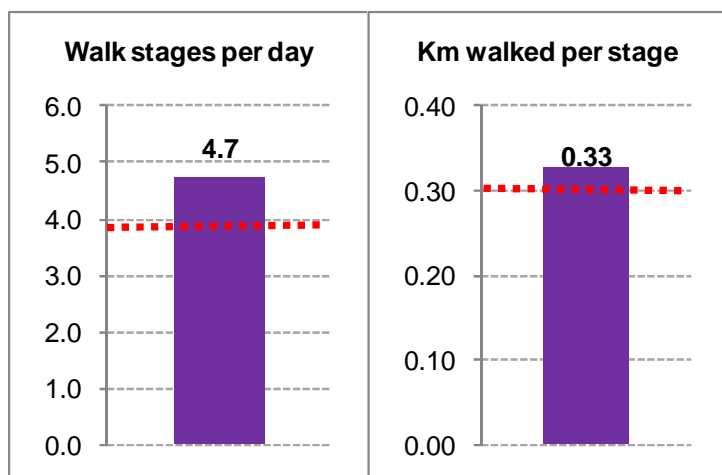
% of sub-region population



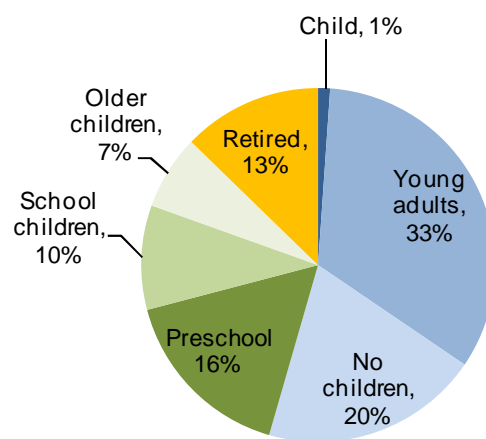
Demographics



Frequency of walking



Lifestage



Use of transport modes

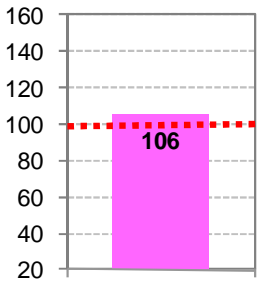
Car driver	Car passenger	Bus	Rail	Tube	Cycle for leisure	Cycle for a purpose	P2W
below average	below average	above average	well above average	well above average	above average	average	well above average

Attitudes to walking (% agree)

Traffic fumes make people dislike walking on London streets	65	I can't be bothered to walk for journeys that would take more than 15 minutes on foot	32
London is a city for walking	82	I see no reason why I should consider walking for journeys that would take more than 15 minutes on foot	24
I don't feel safe walking by myself in my local area	4	Walking is only for people who can't afford other ways of getting there	9
Dirty and vandalised streets make people dislike walking in London	72	I don't think there is enough pedestrian information and signposts in my local area	23

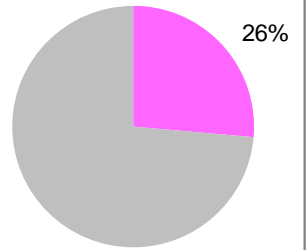
Cultural Diversity

Current walking index



Cultural Diversity have below average incomes and are concentrated in central areas. They tend to be young families of mixed ethnicity. They are above average users of public transport, but only around average for walking.

% of London pop



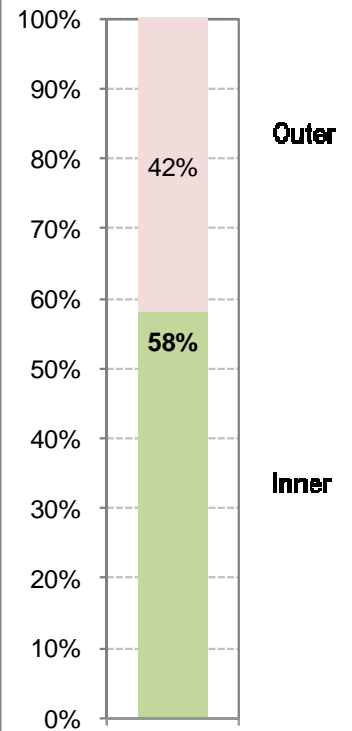
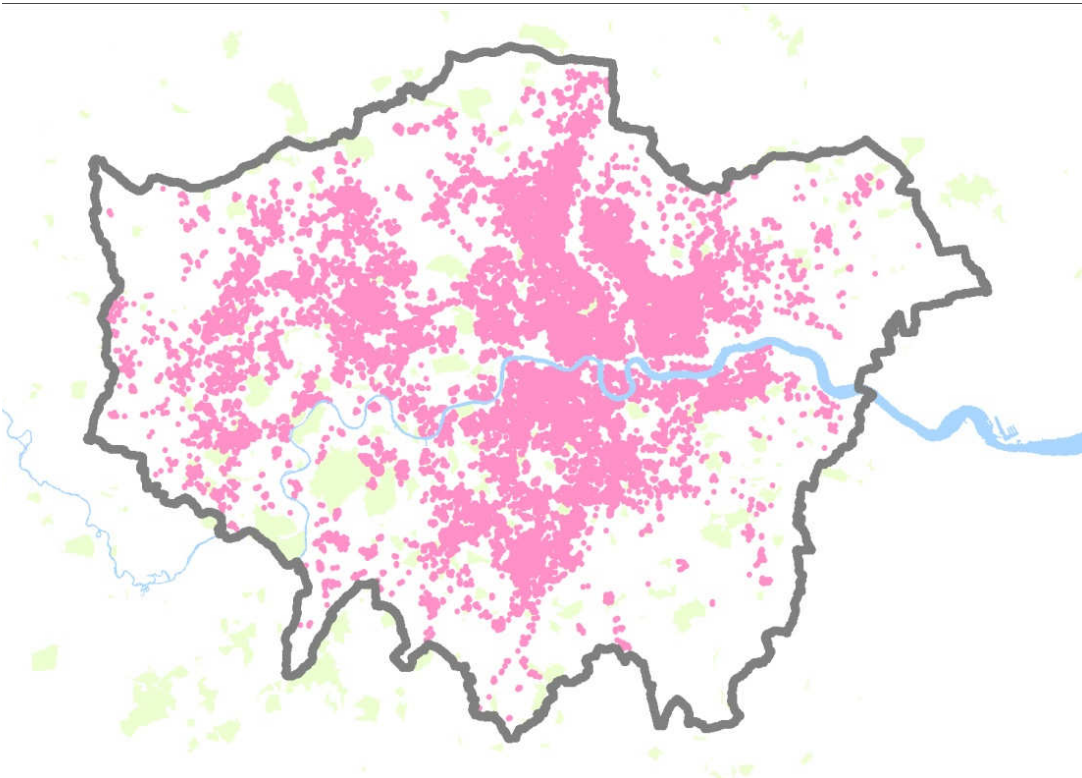
Settled Minorities

Young families and singles of varied ethnic descent, in high density, pleasant urban terraces.

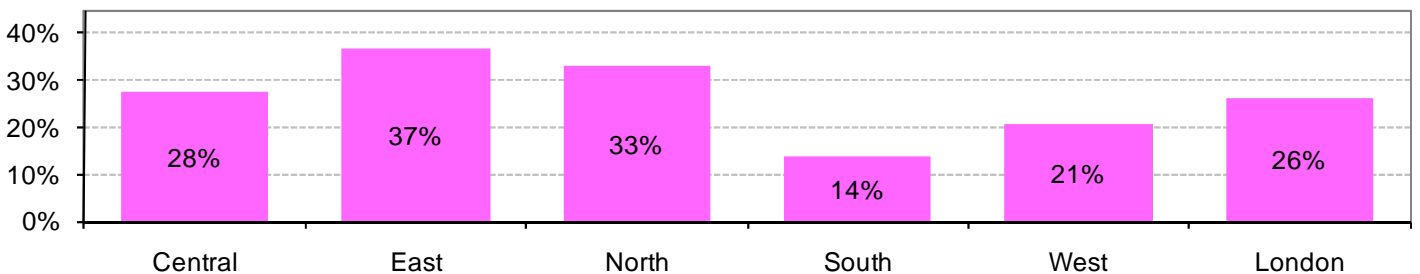


Metro Multiculture

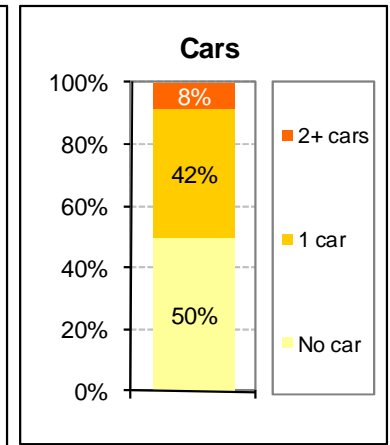
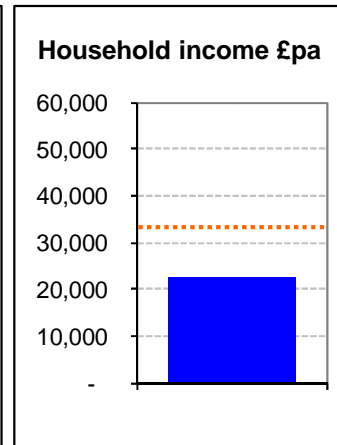
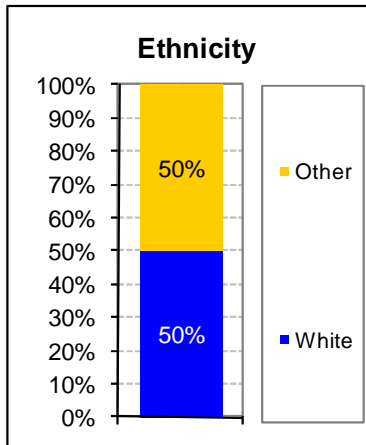
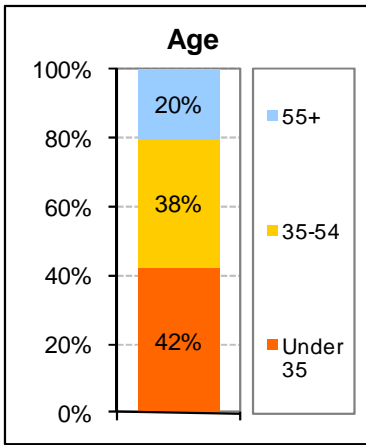
Tenants of public housing in inner city areas, with a high proportion belonging to minority communities.



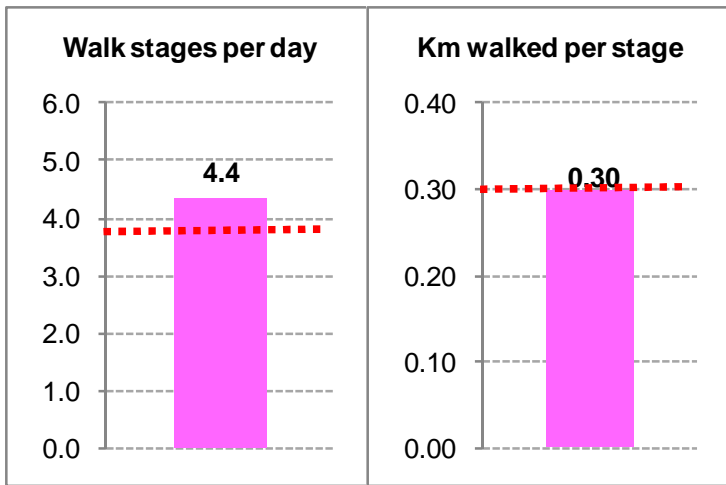
% of sub-region population



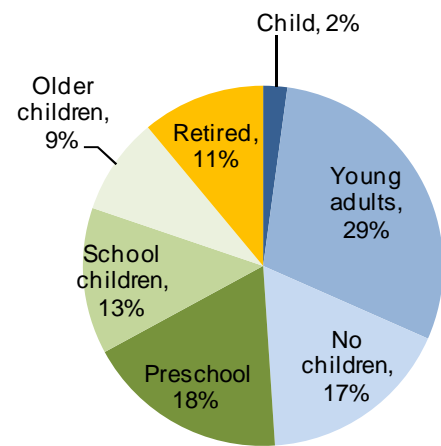
Demographics



Frequency of walking



Lifestage



Use of transport modes

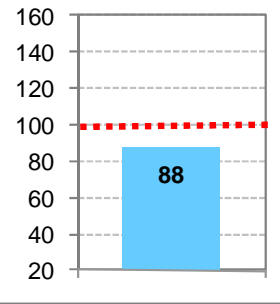
Car driver	Car passenger	Bus	Rail	Tube	Cycle for leisure	Cycle for a purpose	P2W
below	average	above	average	above	average	above	average
average		average		average		average	

Attitudes to walking

Traffic fumes make people dislike walking on London streets	57	I can't be bothered to walk for journeys that would take more than 15 minutes on foot	36
London is a city for walking	64	I see no reason why I should consider walking for journeys that would take more than 15 minutes on foot	38
I don't feel safe walking by myself in my local area	25	Walking is only for people who can't afford other ways of getting there	20
Dirty and vandalised streets make people dislike walking in London	79	I don't think there is enough pedestrian information and signposts in my local area	42

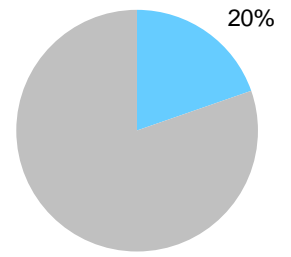
Suburban Living

Current walking index



Suburban Living are commonly families with children on middle incomes, living in pleasant suburban areas. They tend to be white collar workers, using their cars over public transport or other modes for work and for leisure. Their walking is below average, both in terms of the number and length of trips.

% of London pop



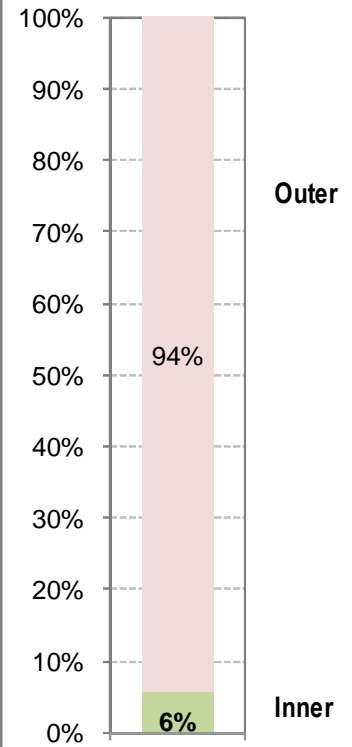
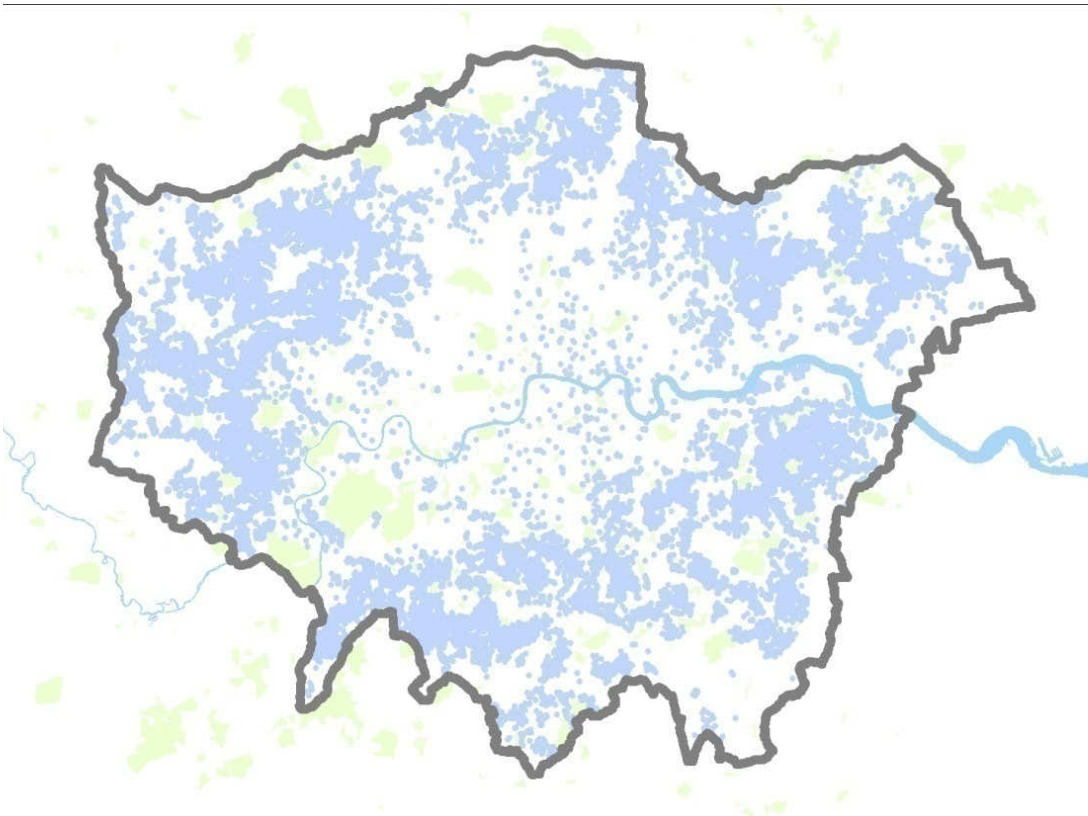
Original Suburbs

Upper white collar owners in established suburban housing.

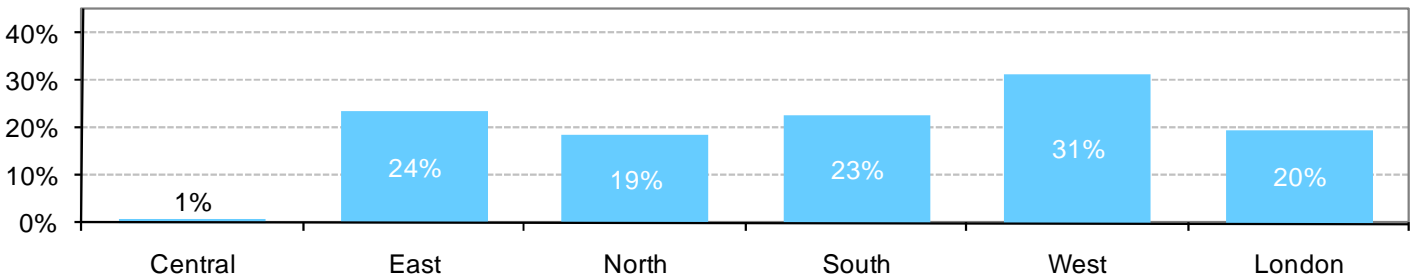


Respectable Rows

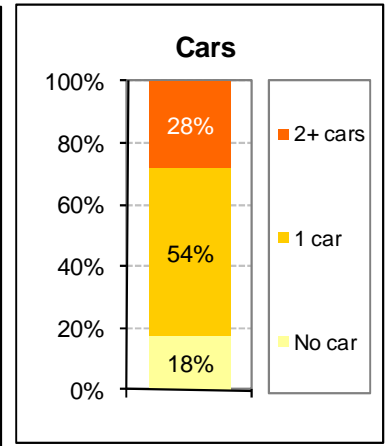
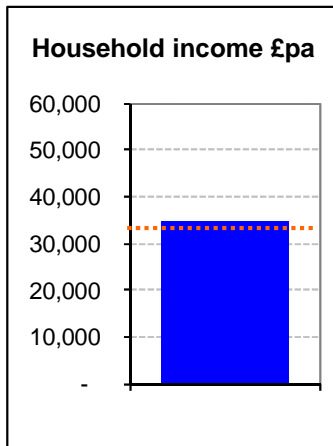
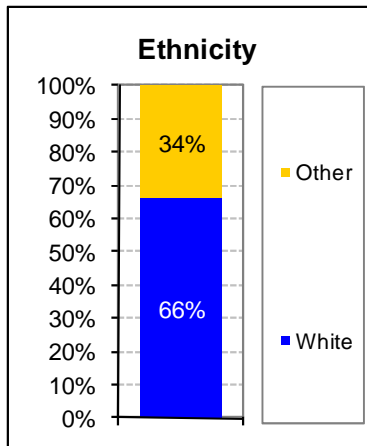
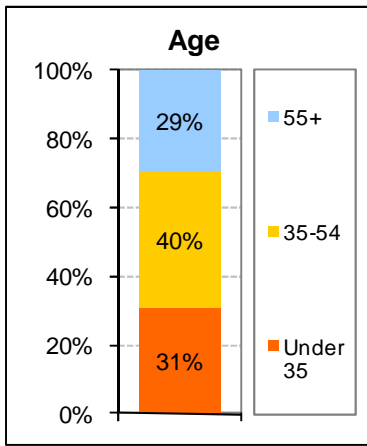
Younger service workers enjoying a reasonably prosperous lifestyle in relatively small terraces.



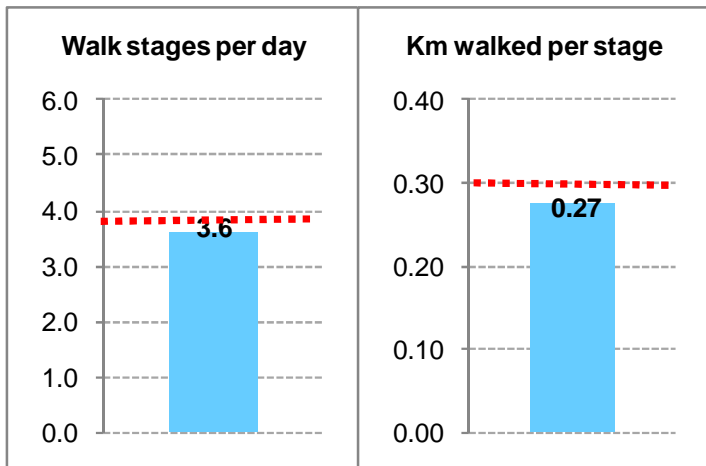
% of sub-region population



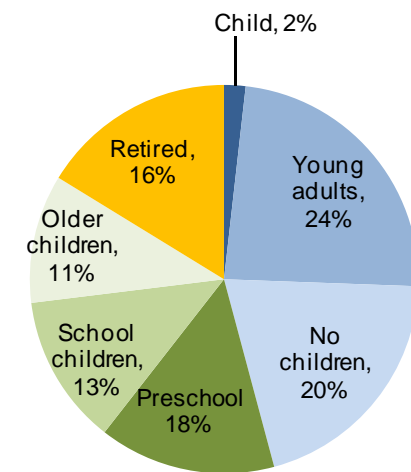
Demographics



Frequency of walking



Lifestage



Use of transport modes

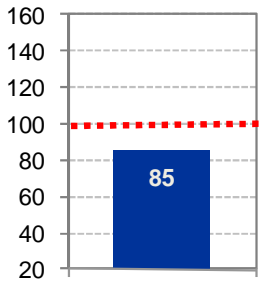
Car driver	Car passenger	Bus	Rail	Tube	Cycle for leisure	Cycle for a purpose	P2W
well above	above	below	below	below	average	above	below
average	average	average	average	average		average	average

Attitudes to walking (% agree)

Traffic fumes make people dislike walking on London streets	62	I can't be bothered to walk for journeys that would take more than 15 minutes on foot	37
London is a city for walking	78	I see no reason why I should consider walking for journeys that would take more than 15 minutes on foot	38
I don't feel safe walking by myself in my local area	26	Walking is only for people who can't afford other ways of getting there	15
Dirty and vandalised streets make people dislike walking in London	77	I don't think there is enough pedestrian information and signposts in my local area	29

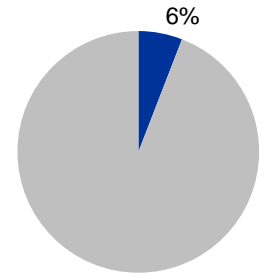
Family Enterprise

Current walking index



Family Enterprise are low to middle income couples and families with high aspirations but relatively limited means. They typically live in council estates in outer areas of the city. They are likely to have access to a car, and walk less than average.

% of London pop



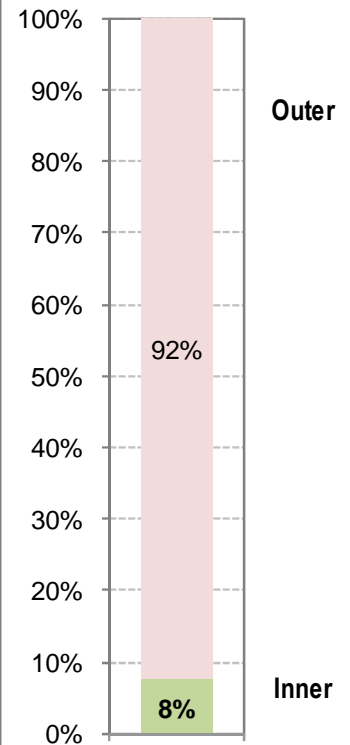
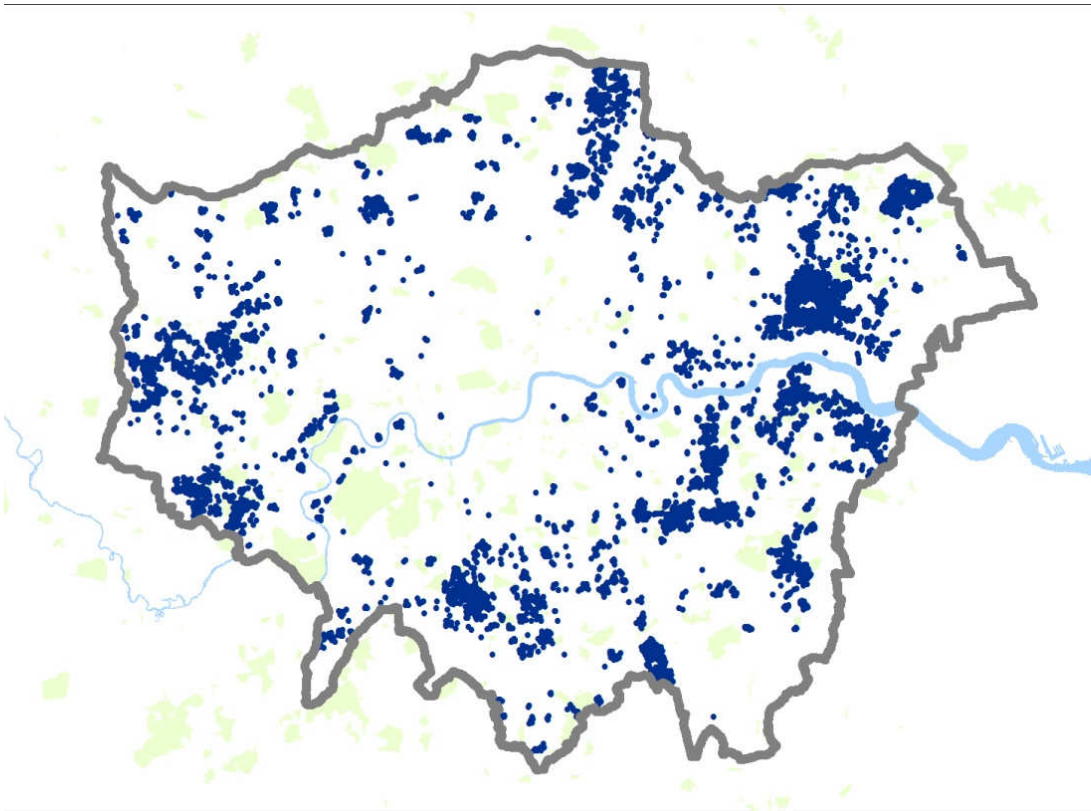
Burdened Optimists

Young couples and families of modest education striving for an aspirational standard of living.

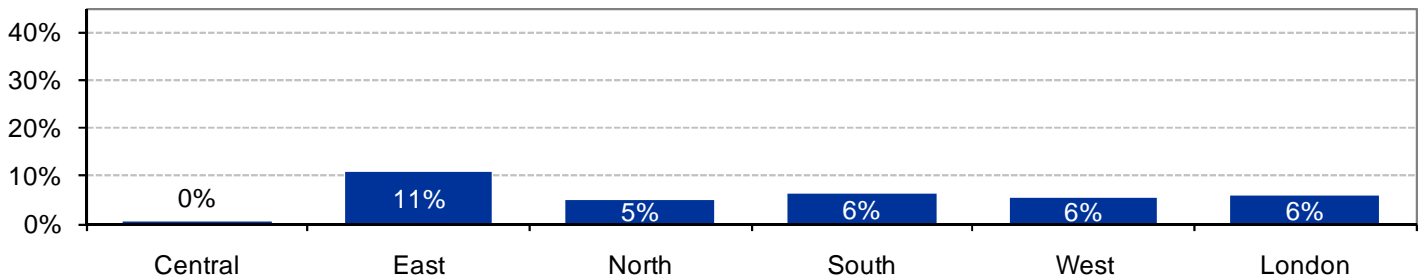


Families on Benefits

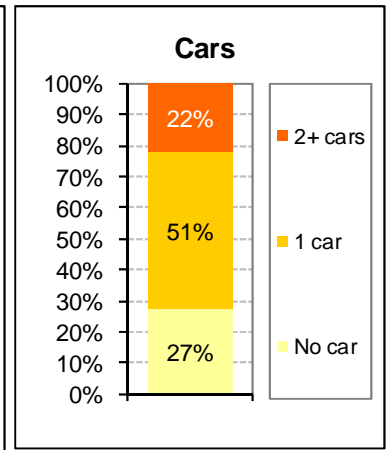
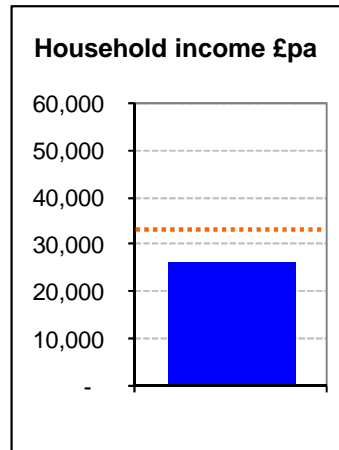
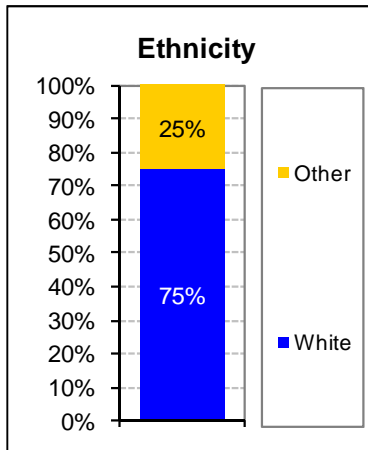
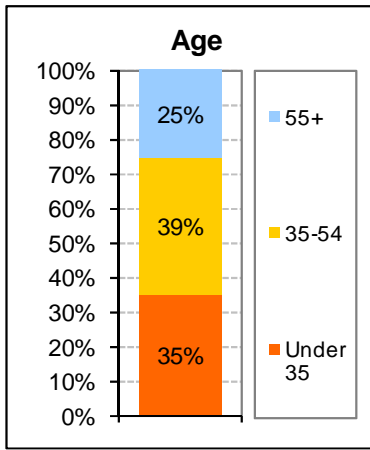
Disadvantaged families with children on very low incomes, typically living in low rise council estates.



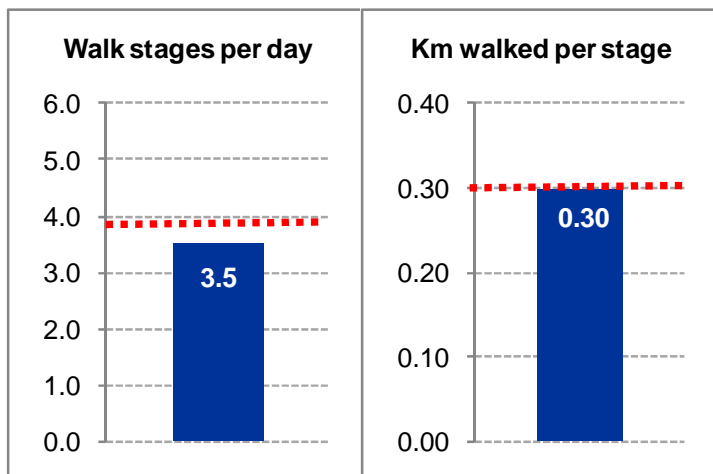
% of sub-region population



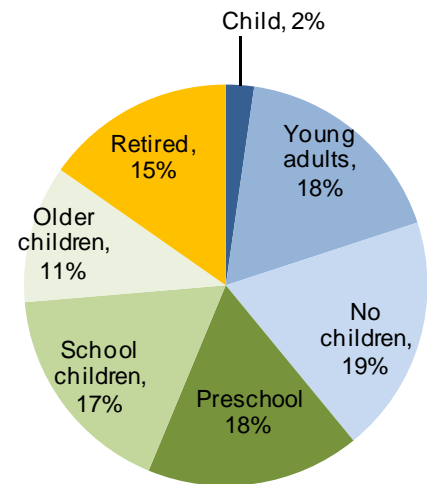
Demographics



Frequency of walking



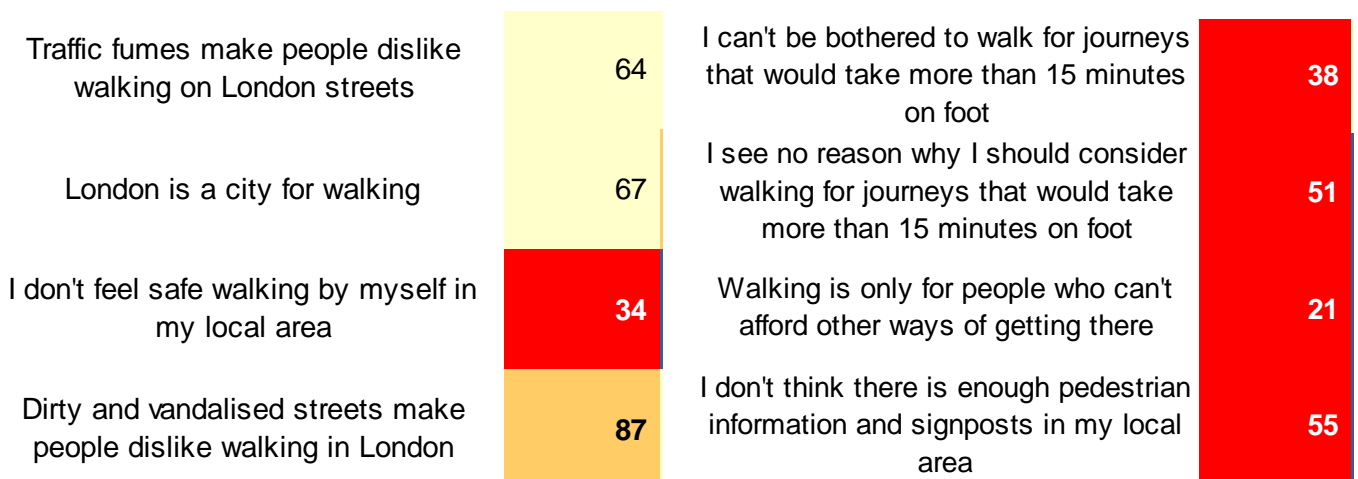
Lifestage



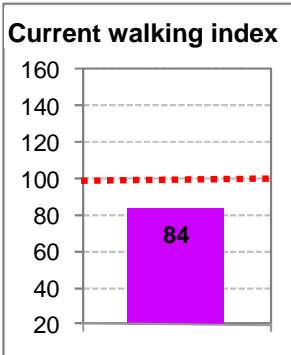
Use of transport modes

Car driver	Car passenger	Bus	Rail	Tube	Cycle for leisure	Cycle for a purpose	P2W
well above	well above	below	below	well below	below	above	below
average	average	average	average	average	average	average	average

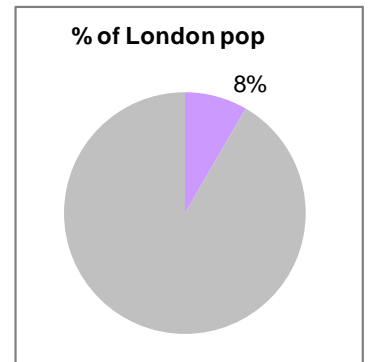
Attitudes to walking (% agree)



Well Off and Well Educated



Well Off and Well Educated are affluent older couples with a high level of disposable income. They live in exclusive suburbs and enjoy active social lives, travelling in to central locations to access restaurants, bars and theatres. They are less likely to use public transport, and tend to have access to more than one car.



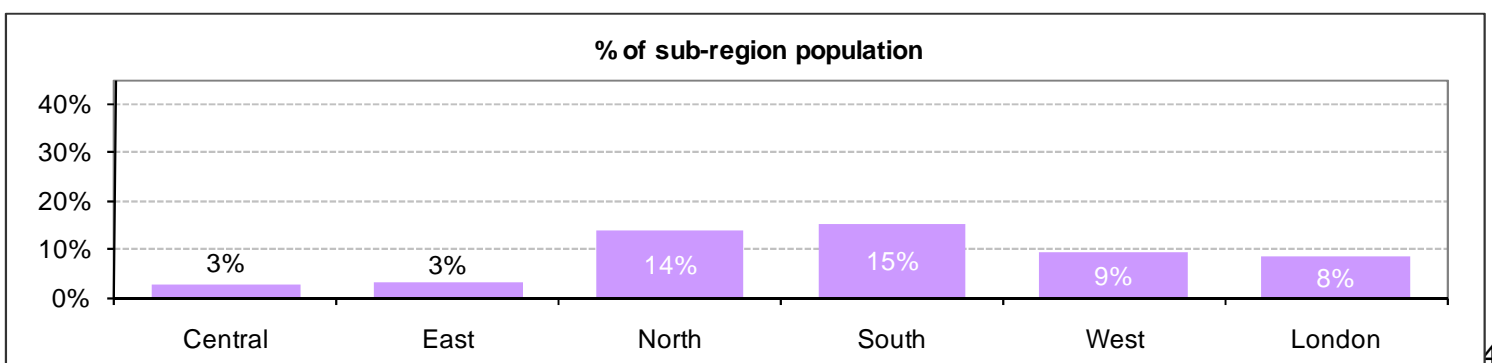
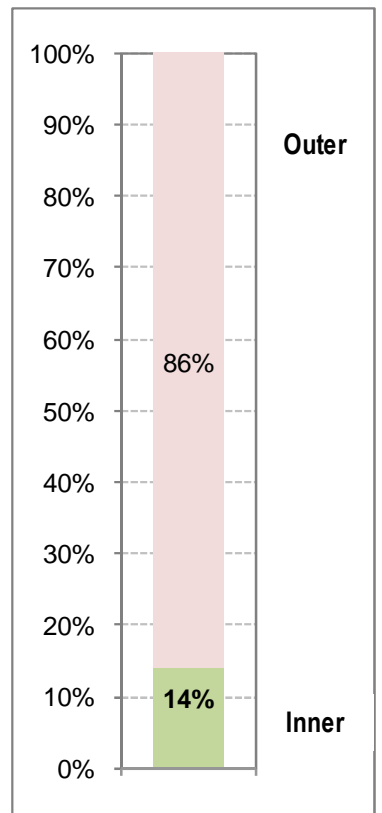
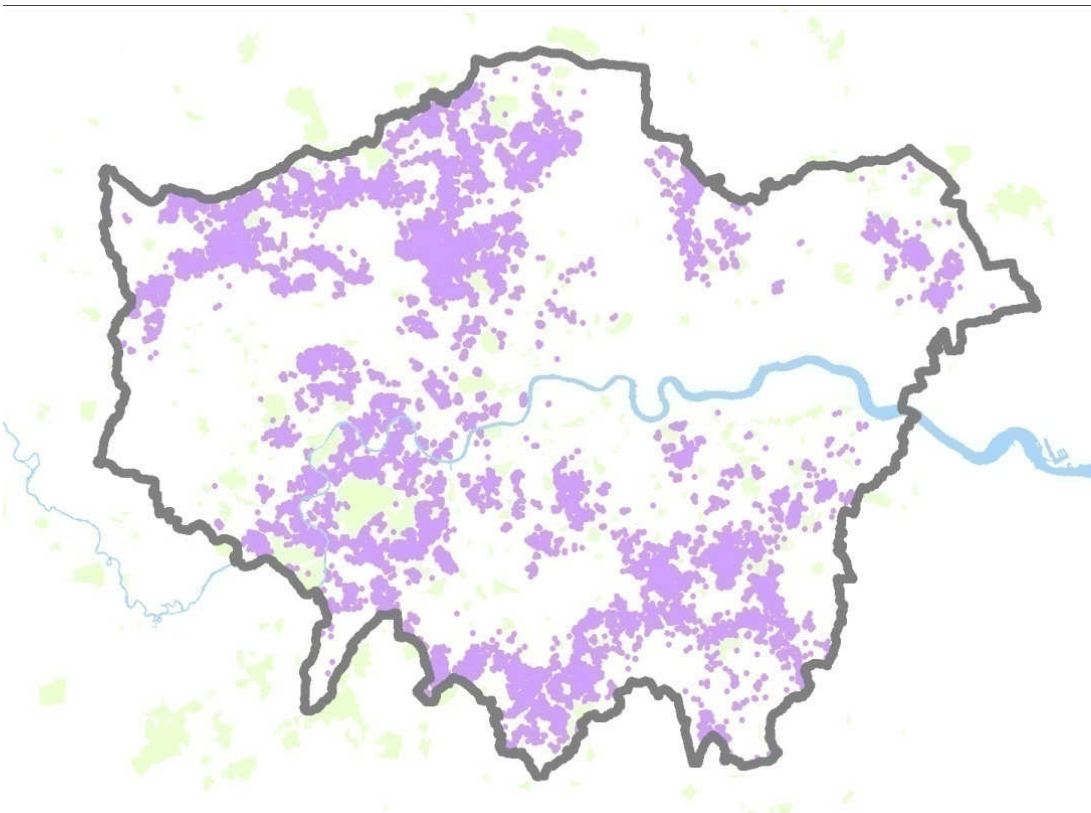
Cultural Leadership

Well-to-do professionals, living in traditional family units in exclusive suburbs.

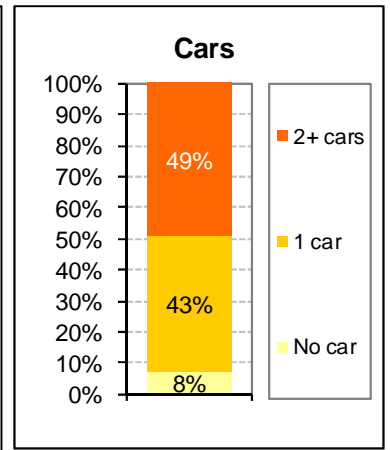
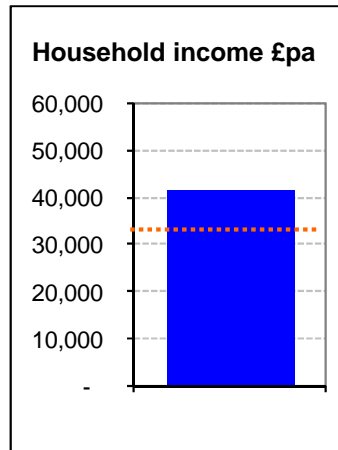
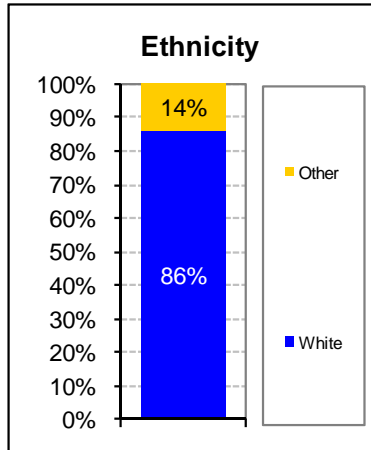
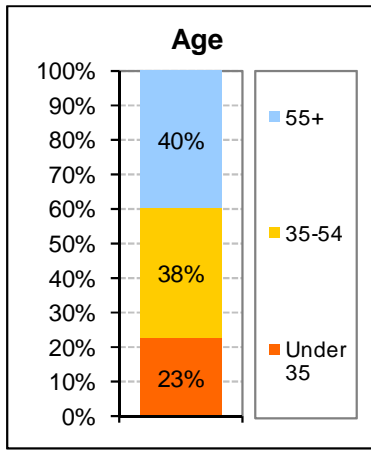


Provincial Privilege

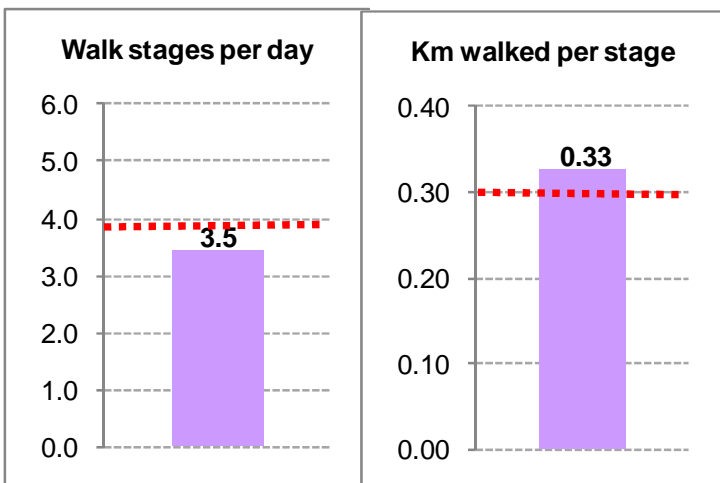
Well-educated older professionals living in established suburbs.



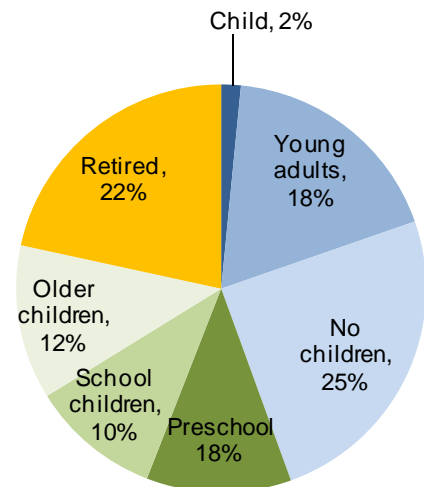
Demographics



Frequency of walking



Lifestage



Use of transport modes

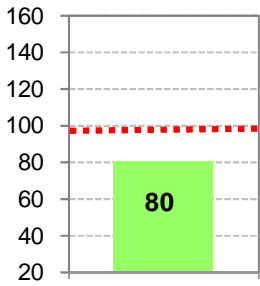
Car driver	Car passenger	Bus	Rail	Tube	Cycle for leisure	Cycle for a purpose	P2W
well above	well above	well below	below	below	well below	below	below
average	average	average	average	average	average	average	average

Attitudes to walking (% agree)

Traffic fumes make people dislike walking on London streets	63	I can't be bothered to walk for journeys that would take more than 15 minutes on foot	20
London is a city for walking	72	I see no reason why I should consider walking for journeys that would take more than 15 minutes on foot	32
I don't feel safe walking by myself in my local area	10	Walking is only for people who can't afford other ways of getting there	7
Dirty and vandalised streets make people dislike walking in London	71	I don't think there is enough pedestrian information and signposts in my local area	27

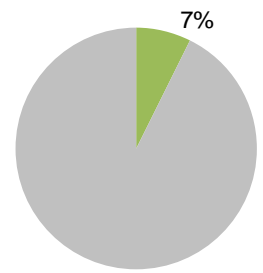
Comfortably Settled

Current walking index



Comfortably Settled are more mature families or older couples on middle incomes. They often live in family homes or older town houses on the periphery of a town centre. They tend to travel by car for work and leisure. Of all the segments they have the lowest propensity to walk.

% of London pop



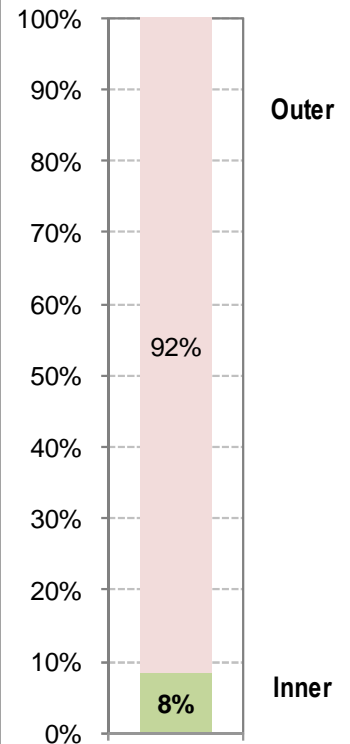
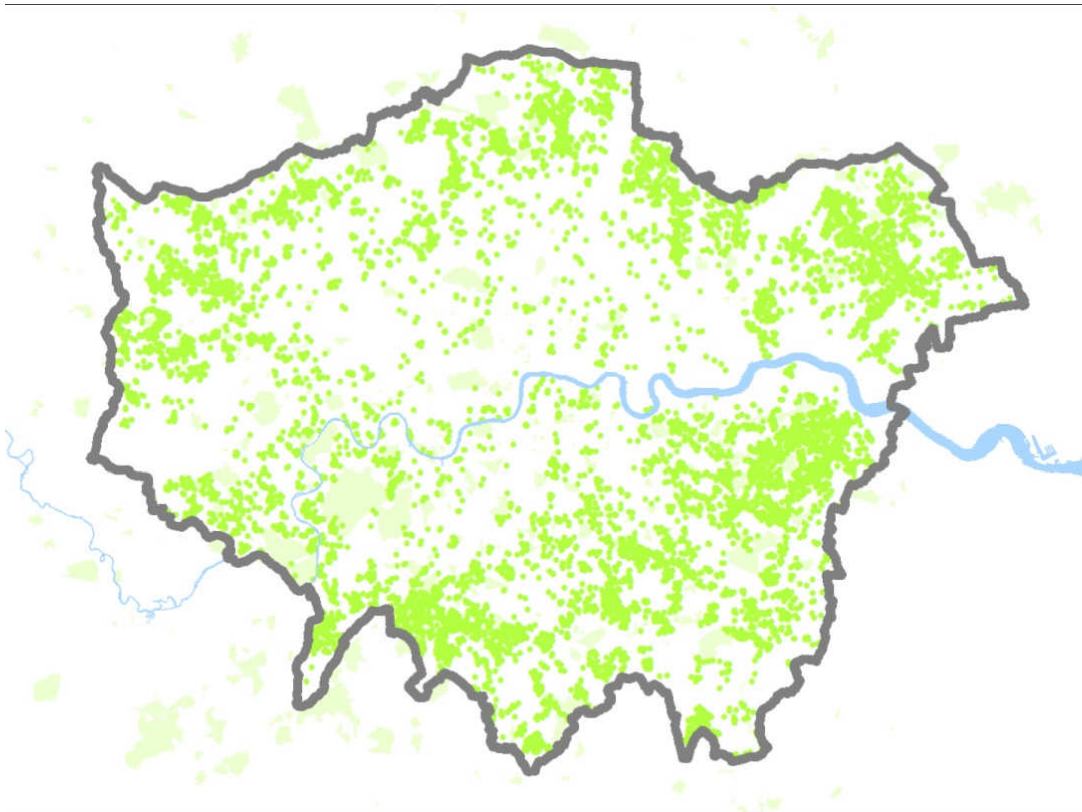
Families Making Good

Upper middle income families in good quality housing, many with school age children.

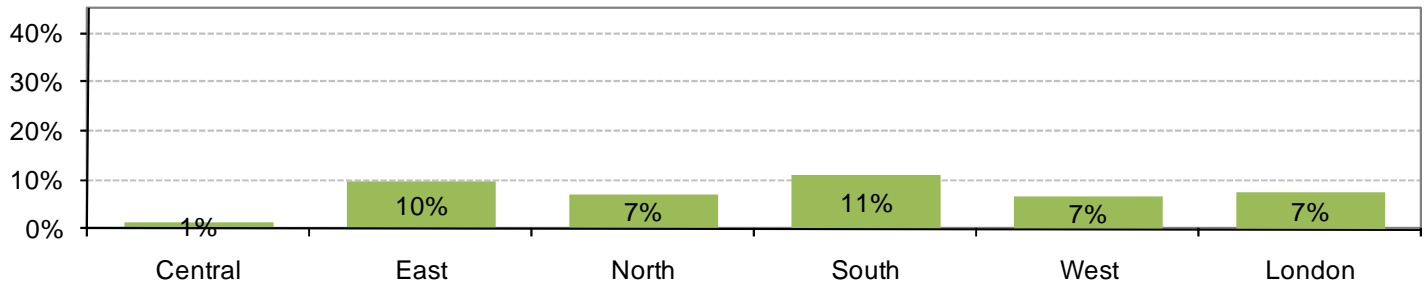


Childfree Serenity

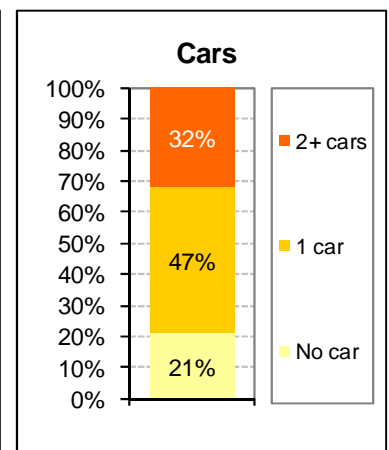
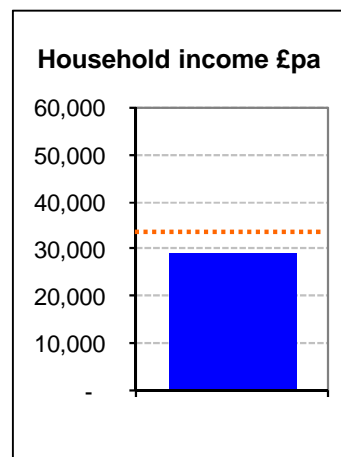
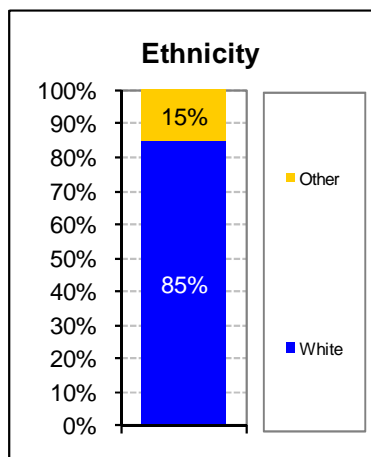
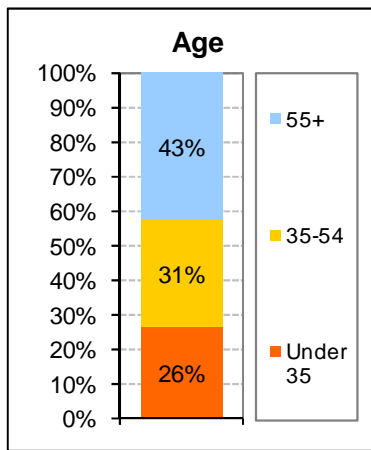
Well-educated couples and wealthy older people in smart private flats or older town houses.



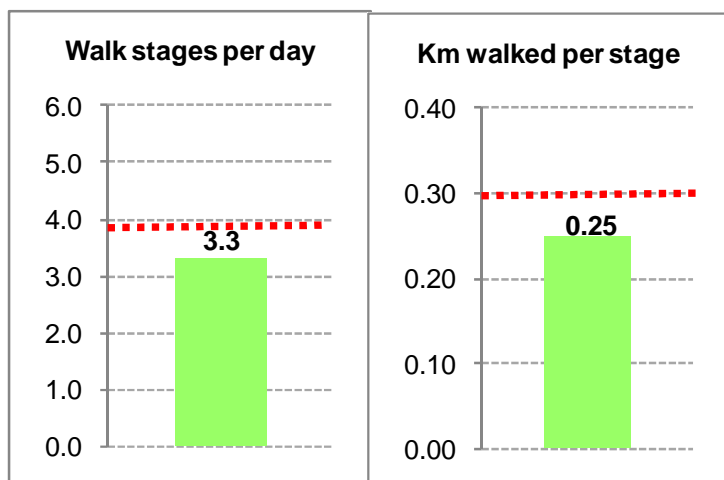
% of sub-region population



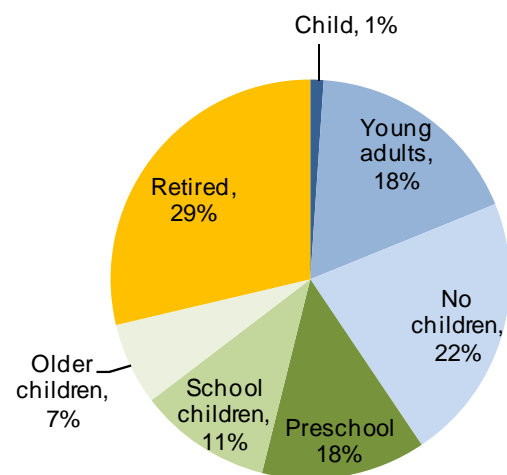
Demographics



Frequency of walking



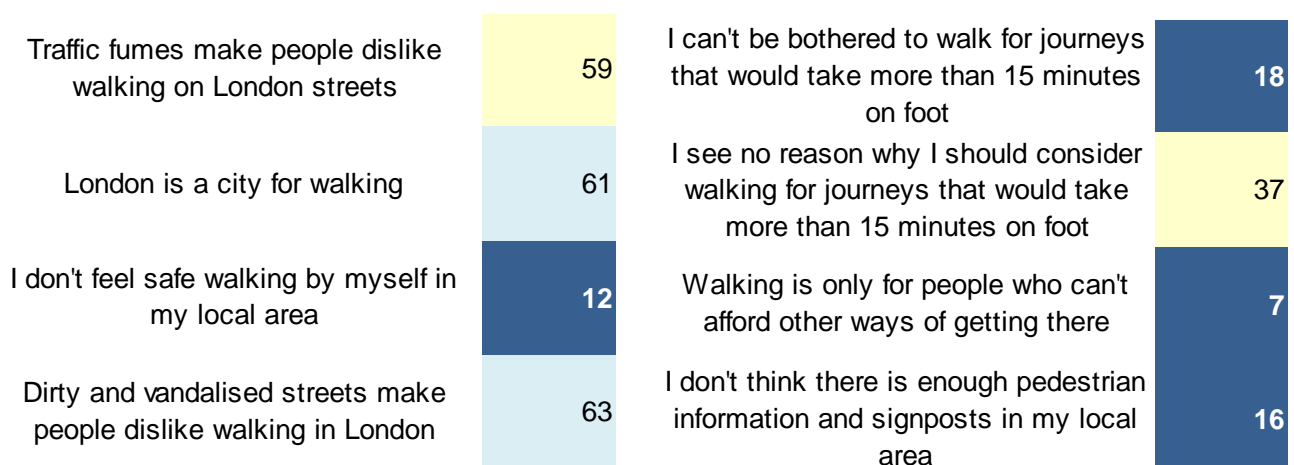
Lifestage



Use of transport modes

Car driver	Car passenger	Bus	Rail	Tube	Cycle for leisure	Cycle for a purpose	P2W
well above average	average	below average	average	below average	well below average	below average	below average

Attitudes to walking (% agree)



Appendices

London averages & sources - Demographics

		London average	Source	Base size
Population by sub-region	Central	1,258,152	Experian's MOSAIC 2007	
	East	1,643,653		
	North	876,915		
	South	1,376,836		
	West	1,191,090		
	Total	6,346,646		
Population in Outer London	Share	59%	Experian's MOSAIC 2007	
Age	Under 35	24%	LTDS 2008/9	14,971
	35-54	35%		
	55+	41%		
Ethnicity	White	70%	LTDS 2008/9	14,971
	Other	30%		
Household income	Average	£37,000	LTDS 2008/9	14,971
Car ownership	No car	33%	LTDS 2008/9	14,971
	1 car	47%		
	2+ cars	20%		
Working status (aged 16+)	Working	62%	LTDS 2008/9	14,971
	Student/ school pupil	9%		
	Unemployed	6%		
	Retired	14%		
	Looking after home	8%		
	Other	1%		
Lifestage (aged 16+)	Child	2%	LTDS 2008/9	14,971
	Young adults	29%		
	No children	19%		
	Older children	9%		
	School children	12%		
	Pre-school	15%		
	Retired	15%		

London averages & sources - Behaviour

		London average	Source	Base size
Use of transport modes (mean trips per annum per person)	Car driver	114.0	Segmentation survey 2009	5024 (2326 geocoded)
	Car passenger	53.3		
	Bus	107.7		
	Rail	51.4		
	Underground	73.5		
	Cycle (leisure)	14.4		
	Cycle (purpose)	16.5		
	P2W	4.6		
Stages per day per person	All walk stages	4.11	LTDS 2008/9	14971
	Walk all the way stages only	0.92		
	All modes	6.84		
Walk km per person	Walk km per stage	0.30	LTDS 2008/9	14971
	Walk km per day	1.24		
Average days per week	Walk for leisure	2.07	Segmentation survey 2009	5024 (2326 geocoded)
	Walk for utility	2.76		
	Walk out of necessity	2.22		
Frequency of walking	5+ days a week	80%	LTDS 2008/9	14971
	3-4 days a week	8%		
	2 days a week	5%		
	1 day a week	3%		
	At least once a fortnight	1%		
	At least once a month	1%		
	At least once a year	1%		
	Not in last 12 months	1%		
	Never used	1%		
Mean expected change in walking	For leisure/ recreation	23	Segmentation survey 2009	5024 (2326 geocoded)
	By choice to a destination	19		
	Out of necessity to a destination	10		

London averages & sources - Attitudes

		London average
Attitudes to walking	Traffic fumes make people dislike walking on London streets	61%
	London is a city for walking	70%
	I don't feel safe walking by myself in my local area	19%
	Dirty and vandalised streets make people dislike walking in London	76%
	I can't be bothered to walk for journeys that would take more than 15 minutes on foot	30%
	I see no reason why I should consider walking for journeys that would take more than 15 minutes on foot	36%
	Walking is only for people who can't afford other ways of getting there	15%
	I don't think there is enough pedestrian information and signposts in my local area	33%

Source: Segmentation 2009, base: 5024 (2326 geocoded)

Attitudes to modes	Car driver	Bus	Train	Tube	Cycling	Walking
Only method	12%	9%	4%	6%	2%	9%
Prefer to use	22%	10%	7%	9%	8%	21%
Happy to use	17%	39%	43%	37%	15%	40%
Avoid using	7%	18%	14%	19%	8%	4%
Use because have to	8%	17%	16%	16%	3%	11%
Would never use	12%	2%	2%	3%	33%	1%
Not available where I live	9%	1%	7%	8%	8%	1%
Don't know	14%	4%	8%	4%	24%	12%

Source: Segmentation 2009, base: 5024 (2326 geocoded)

A note on the Segmentation survey data:

- The base size for the segmentation survey is 2326 for all analysis where geocoded data was required, as this was the available sample with postcodes. The full dataset was used for analysis where possible.
- The lower base size was robust for analysis, and the use of MOSAIC allowed types with small bases (which represent small numbers of people in the actual population) to be grouped with other similar types to mitigate any impacts of low base sizes.

Able profiles and Best Opportunity

- The segmentation survey divides respondents into segments for each mode based on their attitudes and behaviour.
- The segments are:
 - Non user rejectors + non user critics + low user critics = LOST
 - Medium user critics + high user critics = VULNERABLE
 - Non user neutrals + low user neutrals + non user supporters = SECONDARY OPPORTUNITIES
 - High user neutrals = MAINTAIN
 - Low user supports + medium user supporters = PRIMARY OPPORTUNITIES
 - High user supports + high user enthusiasts = SECURE
- Within the Primary Opportunity segment, those who state that they are likely to increase their use, have positive attitudes and have access to the mode are defined as Best Opportunity

Source: Transportation modes segmentation survey technical report, TNS-RI, 2010

Geographical definitions

■ Sub regions (provided by TfL, July 2010)

Central	North	East	South	West
Camden	Barnet	Barking & Dagenham	Bromley	Hillingdon
City	Enfield	Redbridge	Croydon	Harrow
Westminster	Haringey	Newham	Sutton	Brent
Kensington & Chelsea	Waltham Forest	Tower Hamlets	Merton	Ealing
Lambeth		Hackney	Kingston	Hounslow
Southwark		Bexley	Richmond	Hammersmith
Islington		Lewisham	Wandsworth	
		Greenwich		
		Havering		

■ Inner/ Outer London definition from Travel in London report 2 (2010)

- Central - Central Activities zone/ zone 1
- Outer - Outer London Commission definition (Barking & Dagenham, Barnet, Bexley, Brent, Bromley, Croydon, Ealing, Enfield, Greenwich, Harrow, Havering, Hillingdon, Hounslow, Kingston upon Thames, Merton, Redbridge, Richmond upon Thames, Sutton, Waltham Forest)
- Inner - other boroughs excluding Central area

Control Sheet

Project/Proposal Name:	Walking segmentation
Document Title:	Introduction and description
Client Contract/Project Number:	
SDG Project/Proposal Number:	06106

ISSUE HISTORY

Issue No: 7	Date: 07/05/2014	Details: Final - updated base on p.9
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REVIEW

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DISTRIBUTION

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