

Commuter and other travel: Britain on the move

CBS Outdoor show how a new study into the experience of the everyday journey can help advertisers to target their messages more sharply

ROUTINE JOURNEYS PEOPLE make every day are often overlooked or dismissed as wasted time between the many other events that make up the day. Yet these journeys are experiences in their own right. Overlooking their importance in people's lives is a mistake and, for advertisers, a wasted opportunity.

We set out to explore these everyday journey experiences in the Britain on the movestudy – a totally new research challenge for us, as this was the first time we had departed from more typical media research projects and tackled an essentially academic study.

Why have we done this? And why should this study interest readers? Well, apart from the prominent place everyday journeys have in people's daily lives, the level and make-up of people's journeys has changed radically in recent years. Yet while most marketers are pre-occupied with changes in society that technology has brought about, the effects that shifts in consumer mobility have had on society, which in our opinion are just as profound, have gone relatively unnoticed.

Purer research?

First, we should explain what CBS Outdoor does. It is a poster sales company,

specialising in the UK in transport advertising. We currently have contracts to sell advertising on London Underground, national buses and national rail. So clearly we have an interest in understanding as much as possible about people's journeys.

The idea for this academic-style study did not come out of the blue. It was a natural progression of our ongoing research strategy, which is simply to help deliver the ambition of our corporate vision: 'To become the number one media brand for capturing and captivating consumers on the move.'

We decided that if we were serious about achieving this, we needed to make sure we understood mobility and consumers on the move better than anyone else. We needed to move away from media research designed solely to generate sales arguments, and direct our efforts towards a purer form of research.

We are not trying to argue that this study was totally altruistic: far from it. There was obviously a commercial benefit in undertaking a project aimed at positioning CBS, in the eyes of our business partners and clients, as the leading expert in mobility and travel.

Working with the Future Foundation, we developed a methodology that

gathered existing data and then used primary research to plug the gaps we found in the desk research. The result is a comprehensive report on travel trends, travel patterns and journey experiences in Britain today.

Travel trends

The report is entitled *Britain on the move*. Indeed, with time spent travelling and distances covered increasing dramatically over the last 50 years (see Figure 1), our work, our domestic and our social lives are characterised by mobility more than ever. 'Britain on the move' is a fitting description of modern Britain.

Recent history shows that public transport usage has increased year on year. The London Underground passed one billion passenger journeys in 2007, and there are more cars on our roads than ever. People are spending less time at home, working hours are increasing, commute times are lengthening, and people are increasingly prepared to travel further to socialise and see their family and friends.

All this is good news for outdoor advertising: our audience is growing in a media landscape where most other media audiences are heading south. But, while harvesting travel trends through secondary sources is easy, these data provide only a one-dimensional image of the everyday journey. To illuminate these journeys, new research was needed.

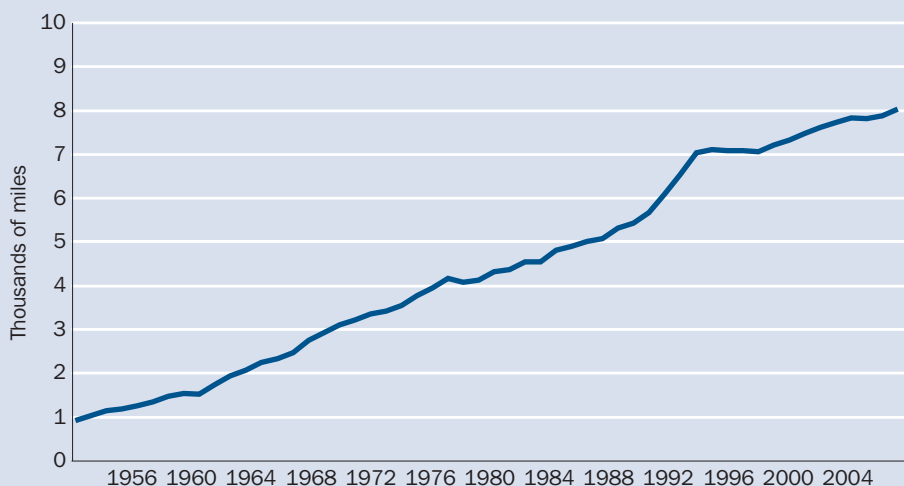
Travel patterns

The first step to understanding the everyday journey was to look at travel patterns. Currently, the average British adult spends more than 80 minutes per day travelling, but clearly we don't all travel for 80 minutes per day; some people travel considerably more, some a lot less. Then, people travel by different modes of transport, at different times of the day and for different reasons. Travel patterns are diverse and complicated.

Let us start with some basic demographics. Men spend slightly longer travelling than women; time spent travelling peaks between 25 and 34 years old and declines from this age onwards (see Figure 2). On average, Londoners travel

FIGURE 1

Total distance travelled per person per year



Source: National Travel Survey – Department for Transport
Base: 8,400 households, 2005

for over 100 minutes per day, compared to the Welsh, who travel for 73 minutes. Managers and other professional occupations average 96 minutes per day, compared to non-workers, who travel for only 70 minutes.

Next we should consider reasons for travel. Commuting, socialising and shopping are the three most common reasons, but this varies from group to group and individual to individual. Men are likely to spend more of their travel time commuting than women; women, to spend a greater proportion travelling in order to shop. However, both sexes spend a roughly equal proportion of travel time for socialising.

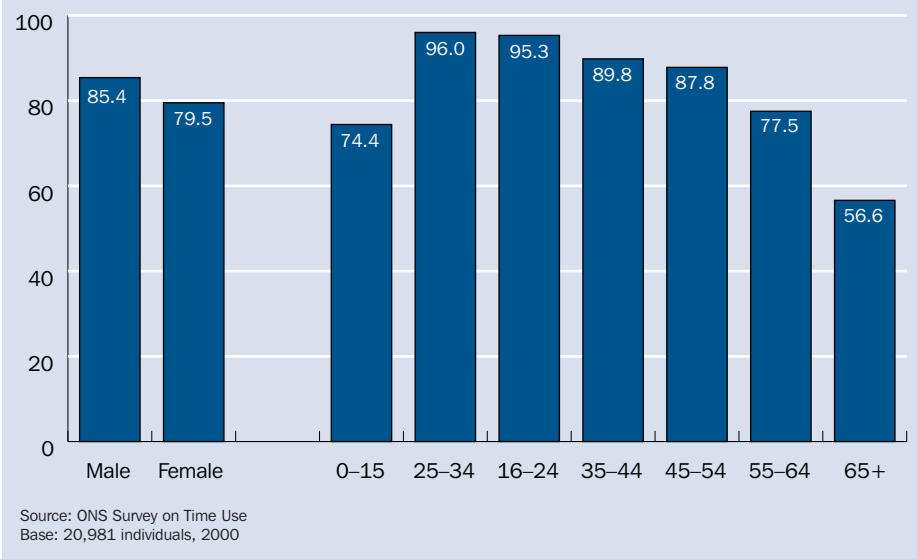
Time of day also affects travel for different occupations or economic groups. For example, professional occupations have definite travel peaks in the morning and early evening; semi-routine and routine occupations don't exhibit these peaks (see Figure 3) and, as a result have completely different travel profiles. These two profiles highlight the difference commuting makes, as the rest of the travel profiles are quite similar.

It is not possible to analyse travel patterns without investigating the role of modes of transport. The number one form of transport is on foot, followed by car. But, like everything else, people's travel mode profile varies according to numerous factors: demographics, location and occupation all play a part, as do journey purpose and time of day. Unsurprisingly, levels of public transport use are higher in London than elsewhere; young people's use of public transport is higher at peak times, whereas older age groups are more likely to use it at quieter times of the day.

Knowing how different modes of transport fit into people's travel patterns is of value both to transport operators and advertisers. For travel operators, the interest lies principally in planning and targeting new customers. For advertisers, the mode of transport directly influences who you reach and in what numbers. Advertising on the outside of a bus targets vehicular travellers and pedestrians, as does roadside and bus shelter advertising. Advertising on the inside of a bus, on rail

FIGURE 2

Number of minutes spent travelling by gender and age



on the Underground targets users of that form of transport.

Therefore, understanding a professional person's journey patterns, or those of an 18-24-year-old man, has obvious commercial benefits through improved targeting and greater understanding of how a particular campaign will be viewed, by a particular audience.

These days, knowing your target audience's travel patterns opens up a range of new opportunities. Recent developments in digital outdoor formats mean that it is possible to target groups by time of day as well as location.

The experience of travel

The experience of travel is one of the most revealing areas of the report and contains much commercially useful information, as well as visceral insights into people's journeys. Travel moods, travel activities, advertising awareness and the use of technology on the move not only provide a wealth of PR opportunities, but also insights into people's journeys that are of interest to travel operators and advertisers.

The study of moods and emotions associated with travel was particularly fascinating, partly because of preconceived notions about emotions while

travelling. For example, it is commonly believed that people are stressed and angry while on the Tube and people in London are always in a hurry.

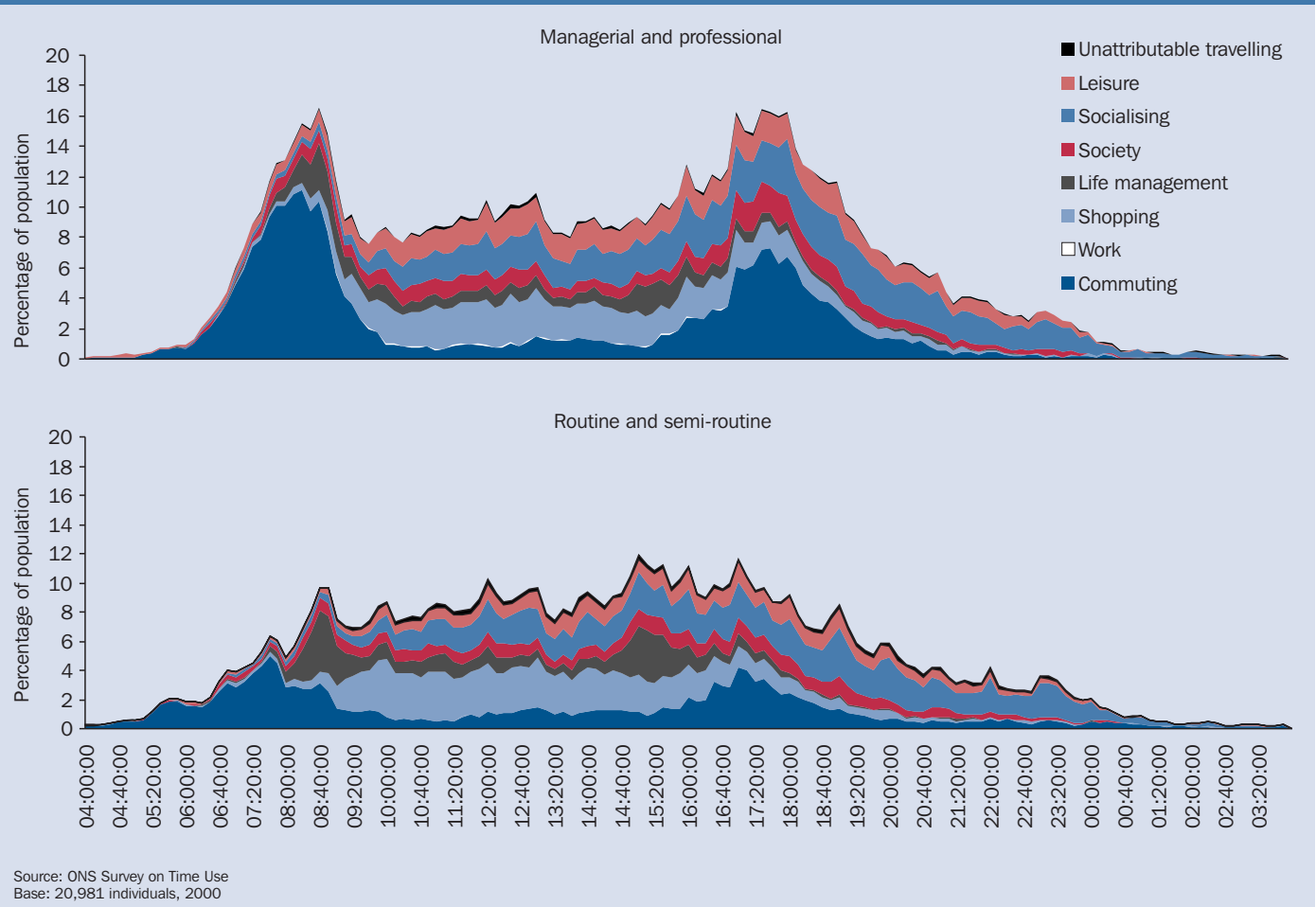
While there is some evidence that this is so, the reality is surprising. Tube users are more likely to be angry and less likely to be calm than drivers or walkers, but only marginally. In fact they overwhelmingly claim to feel calm when travelling on the Tube (see Figure 4). A similar pattern can be seen when analysing how hurried or unhurried Londoners feel compared to travellers in the rest of the country. Yes, they are more likely to be rushed or stressed, but for most of the time Londoners spend on public transport they don't feel rushed or stressed at all.

The purpose of your journey has the greatest impact on your emotional state during it. You're more likely to feel sad or stressed travelling to work than when you go out to meet friends on a social night out, whatever your travel method. This can be seen in Figure 5, where moods dip during the busiest commuting times.

Who you're with also has a significant impact on your emotional state: you're much more likely to feel positive travelling with your partner or friends than when on your own. However, this may be

FIGURE 3

Average travel through the day for two different types of occupation



Source: ONS Survey on Time Use
Base: 20,981 individuals, 2000

because journeys you make with your partner or friends are more likely to be to a destination of choice than simply being on your way to work (a journey you are more likely to make on your own).

The issue of how safe or at risk people feel when travelling is also interesting, particularly for transport operators. While the overwhelming feeling is of being safe whatever your mode of travel, people feel slightly safer in cars than on public transport.

Interestingly, Londoners feel safer than those outside the capital while on public transport – perhaps due to the busier nature of London travel, with other passengers always in close proximity. Another reason for this appears to be increased awareness of CCTV cameras, which they feel are helping to keep them safe.

Technology on the move

Another intriguing theme is the use of technology on the move and the contribution this makes to the economy. Laptops, PDAs and mobile phones are enabling people to work while travelling to or from work. Obviously you're fairly limited when driving, but using public transport allows people to take advantage

of these technologies; 21% of the population agreed that 'electronic gadgets such as mobile phones, PDAs and laptops have made my journey to work more 'productive'.

The Future Foundation calculated that the contribution to the UK economy made by people working when they are travelling amounts to a staggering £9 billion.

Environmentalism and travel

The environment is a hot topic and nowhere more so than in the area of transport. Intuitively, one might assume that growing levels of environmental concern would be good news for public transport, forcing people out of their cars and onto the train or bus. However, it seems that environmental concerns alone have had very little effect on getting people out of cars and onto public transport.

Some 51% of those not planning on changing their travel patterns for environmental reasons cite practicalities. Only 19% say it is because they do not believe they will make a difference. This corresponds with the rest of the analysis, which suggests that practicality is the strongest reason people do or do not use public transport.

There is, however, a strong correlation between the expression of anti-car environmentalism and public transport use; 62% of non-drivers think that 'public transport is more environmentally friendly than driving by car', compared to 34% of those who drive. It also appears that these consumers are proud that they use public transport and turn it into a position from which to criticise car use.

This should be of interest to advertisers as well as transport operators, who can use environmental messages to appeal to public transport users' perceived environmental credentials. While appealing to environmental sentiments might not work for transport operators as a way to attract new users, it should help to increase loyalty and pride among current users.

Segmentation of traveller types

It will surprise no one that attitudes to travel in Britain are fragmented. Opinion varies from people who, given the choice, will always use public transport, to those who refuse to even consider not using their large 4x4 around town.

The study identified five distinct segments among attitudes to travel and transport. In the report, we have used

these segments to predict travel patterns and the experience of travel. It has been a fascinating way to add colour and depth to the study.

Segmentation also enabled us to isolate people who don't use public transport and who have very different attitudes towards it. Some express relatively positive feel-

ings towards public transport and use a car for practical reasons; others have an almost ideological commitment to driving and resent any argument against doing so.

Of the five clusters, two regularly make use of public transport: we named these 'Eco cultural capitalists' and 'Young and car free'. Of the remaining three groups two are firmly pro-driving, with one group ('Bitter motorist lobby') rejecting all limits on car use. Those in this group are most likely to think that speed cameras unfairly penalise motorists, and only 25% believe that using public transport is more environmentally friendly than driving. The other pro-driving group ('Not green van man') are similar in most respects, but are even less concerned about the effect of transport on the environment. Neither of these groups appears to be convertible to public transport.

Those in the final group, however, though not regular public transport users, are relatively well disposed towards it. Named 'Safety first', they enjoy travelling; they like to read on public transport and have really noticed the safety benefits of CCTV. They are a little older than average and tend to be female. Interestingly, they support green issues and, though this is unlikely to be enough on its own, with it come positive associations for public transport. This group presents a clear opportunity to transport providers to develop service improvements and marketing communications to appeal to them.

The uniqueness of everyday journeys

Everyday journeys are much more than the wasted time between different events in the day. Not least, they take up a significant proportion of each and every day, for every individual in this country.

Yet the nature of these journeys, both in terms of variety and experience, elevates them to significant events in their own right – sometimes more significant in people's lives than the events they connect.

FIGURE 4

Variation in mood through the day by mode

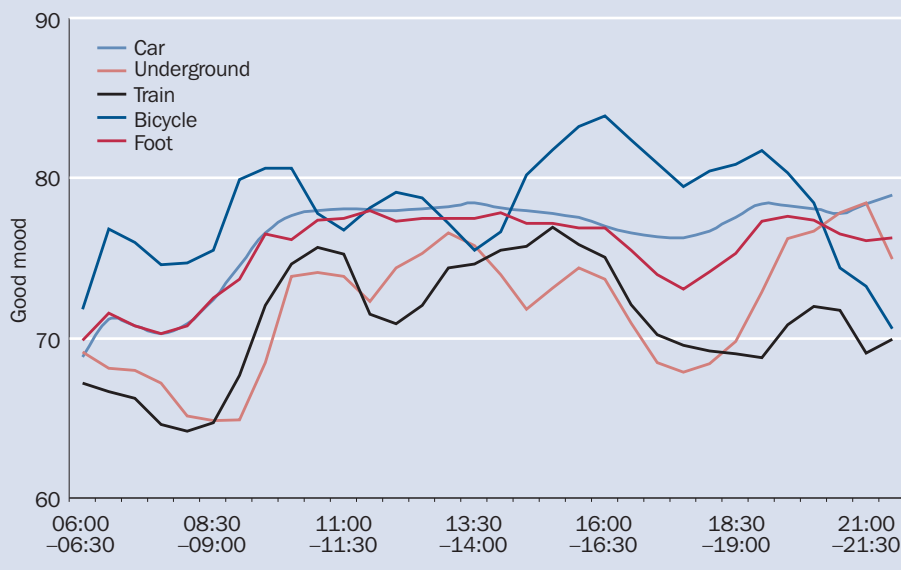
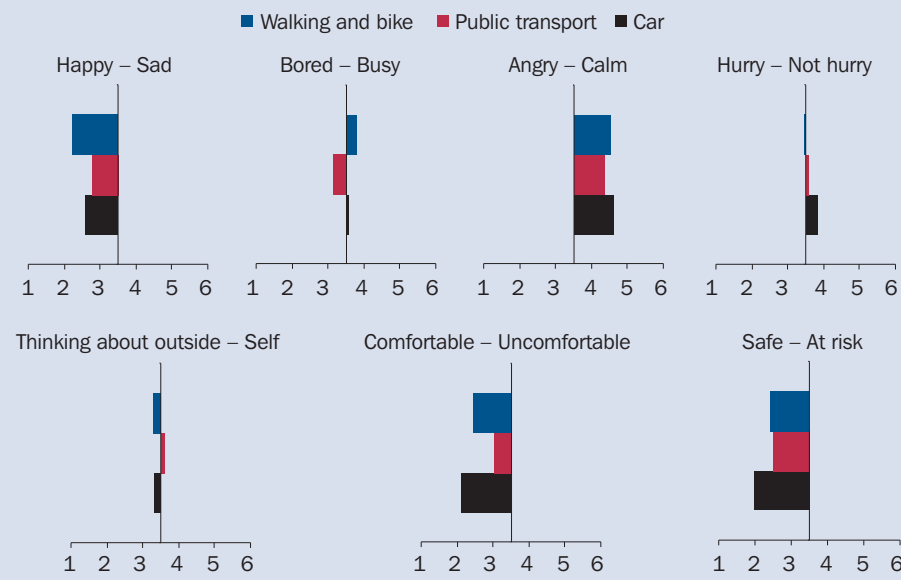


FIGURE 5

Using the sidebars below, please indicate how you felt during the journey in question



Source: CBS/Future Foundation: Britain on the Move
Base: 1,813 16–75-year-olds, 2007