

04
Segmentation

Segmentation overview.

Audience understanding and targeted messages.

A key aspect of ensuring insight is actionable is breaking down the student population into subgroups or segments. With self-perception and identity playing such a large role in students' relationships with cycling and travel modes, it is vital that they are not treated as a homogenous mass.

Splitting the population into groups with shared characteristics, perceptions and priorities ensures messaging is targeted, and appropriate to the types of students any campaign is seeking to engage.

Segmentation.

The two aspects by which the student population is split up in this model came out strongly in the qualitative interviews as key underlying factors influencing attitudes and behaviours around travel mode choice.

Other potential aspects, such as attitudes to the environment or sustainability or degree of cost consciousness either did not seem to exert a large influence on behaviours in the case of the former, or seemed to be common to all students (i.e. did not segment them) in the case of the latter.

The segmentation is based upon the following aspects:

- How independent or reliant they are, primarily in relation to travel
- How adventurous or safe they are, primarily in relation to travel

In combination these pull the population apart into segments which tend to share common behaviours, perceptions and priorities.

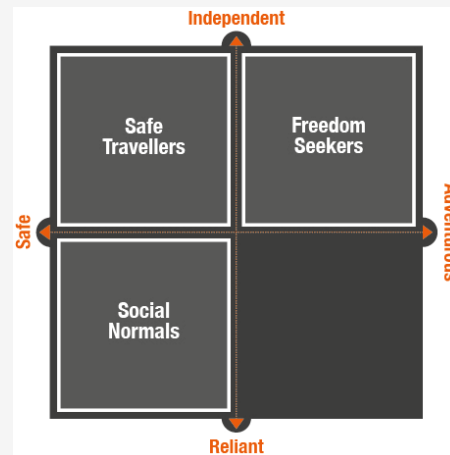
Segmentation overview.

Segments.

Where these aspects combine different segments arose from the qualitative insight, with differing levels of independence and adventurous, and thus requiring different marketing tactics and messages. Using proxy measures from the earlier quantitative survey data, the segments were estimated to be roughly equivalent in size, apart the combination of adventurous and reliant. This was found in very few respondents, and so the recommendations focus on the other three.

- Freedom Seekers are more adventurous, and their independence is very important to them – they do not like being reliant either on public transport or others to get around
- Safe Travellers are similarly independent, but value adventurousness less, and place an importance on safety and security
- Social Normals are much less motivated by independence, are more concerned with safety, and tend to be even more influenced by social norms than other segments

The segments are described in more detail in the following pages. Recommendations for messaging messages and activities (pgs 52, 53) indicate which segments they target through both the content of the messages, and type of activity.



Segmentation detail:

Freedom Seekers.



Independent and adventurous.

In terms of demographics, more likely to be male than female and come from a mix of urban and rural backgrounds. This background plays out in the way in which the desire for independence and self reliance that is so important to the segment found its outlet. Those from a rural background tended to learn how to drive to cover the distances involved in travelling to see their friends, whereas those from urban backgrounds could rely on public transport infrastructure, or safer cycling routes than country lanes. If a driver they tended to learn at a very early age from their family of drivers.

General life priorities include fun and enjoyment being placed highly, a value placed on living a free or unencumbered life, and reveal a generally self-oriented and self-reliant attitude. This is evident in their travel priorities, where having to rely on others is viewed negatively. Simplicity, speed, and self-controlled modes are preferred.

They tend to have positive perceptions of cycling, even the drivers viewing it as safe and speedy way of getting around. They tended to accurately pick cycling as the fastest way of travelling four miles across Bristol in the morning. It should be noted though that even the die hard cyclists state the weather has a big influence on whether they would cycle or not.

Segmentation detail:
Freedom Seekers.



Independent and adventurous.

Self-perception:

- Happy, independent, outgoing
- Adventurous, had a happy childhood
- Confident, fitness conscious, hard working, rebel

Perception of cyclists:

- Fitness conscious
- Adventurous, environmentally aware, independent, money conscious
- Hard working

Perceptions of drivers:

- Independent
- Conventional
- Achiever, confident, hardworking, money conscious, outgoing

Freedom Seekers quotes.



“The car was the only way for me to get to see my friends, and have my independence.”

Female

“For me cycling equals freedom, and I only have to rely on myself.”

Male

“Passing the test was great, I could see friends who lived further away – independence!”

Female

“The speed of getting through traffic on a bike makes it less frustrating, and getting to uni quickly and sleeping longer is cool.”

Male

Segmentation detail:

Safe Travellers.



Independent and safe.

Safe Travellers are slightly more likely to be female than male and like Freedom Seekers come from a mix of rural and urban backgrounds. They also place a high value on gaining and maintaining their independence as an individual. They are more likely to drive or walk.

In terms of life priorities and values, they tend to place a lesser importance on adventure, challenge and change. They are more social and place family and friends as of importance to them. This comes with a desire to fit in and gain social acceptance.

Their travel priorities see them valuing safety and security highly, and also describing themselves as lazy in terms of travel and see biking as involving a great deal of effort. Their travel perceptions reinforce their priorities with security and safety, and they are concerned that cycling is dangerous, a hassle, and worry about storage issues. They may also have had a bad prior experience with cycling, either an accident or witnessing an accident.

Segmentation detail:

Safe Travellers.



Independent and safe.

Self-perception:

- Independent, had a happy childhood
- Confident, fitness conscious
- Achiever, happy, outgoing

Perception of cyclists:

- Independent
- Fitness conscious, environmentally aware, money conscious
- Confident

Perceptions of drivers:

- Independent
- Confident, outgoing
- Conventional, achiever, daring, rebel, shy

Safe Travellers quotes.



“It’s a faff having to lock your bike up, I don’t want to worry about it getting stolen. I just don’t see myself figuring out bike logistics.”
Female

“I am scared of cycling, even looking at cyclists scares me, I don’t understand why some don’t wear a helmet.”
Female

“I used to cycle in London but I’m scared to now after having 2 accidents.”
Male

Segmentation detail:

Social Normals.



Reliant and Safe.

Social Normals are more likely to be females than males, and more likely to still live at home. They tend to come from a mix of urban and rural backgrounds, and if they drive, they tend to have learned much later than other segments. They are more likely to either take the bus or walk.

In terms of life priorities, social acceptance and fitting in is more important than for any other segment. Their social groups have a big influence on them as belonging is an important part of their identity. They are much less urgently motivated by freedom and independence, and tend to be quite other-orientated, placing friends and family high and being aware of responsibilities and dependencies. They may tend to be less engaged with decision taking, and more habitual and passive. More likely to consider behaviour change if seen as the norm. May have some aspirations toward becoming healthier or active.

Convenience and ease are the most important aspects of travel for them, and safety is a high priority too. They tend to perceive cycling as unsafe, though they have no misperceptions about how fast it is, picking it out as the quickest way of covering 4 miles in morning traffic in Bristol.

They tend to have the perception that biking would make them stand out from the crowd, and involves having to wear special or silly clothes and gear.

Segmentation detail:
Social Normals.



Reliant and Safe.

Self-perception:

- Happy, hard working
- Achiever, confident, money conscious
- Boring, conventional, environmentally aware

Perception of cyclists:

- Environmentally aware, hardworking, independent, money conscious
- Adventurous, confident, fitness conscious, happy
- Cheeky, daring, free spirit, outgoing

Perceptions of drivers:

- Boring, confident
- Conventional
- Independent

Social Norms quotes.



“I really want to try doing more sport now I’m here, I can see so many people being active and healthy and joining clubs etc.”

Female

“If I were with a bunch of friends I’d definitely take the bus as it’s more social and I wouldn’t want to miss out.”

Female

“Safety on a bike is a bit worrying, the traffic and falling off concerns me.”

Male