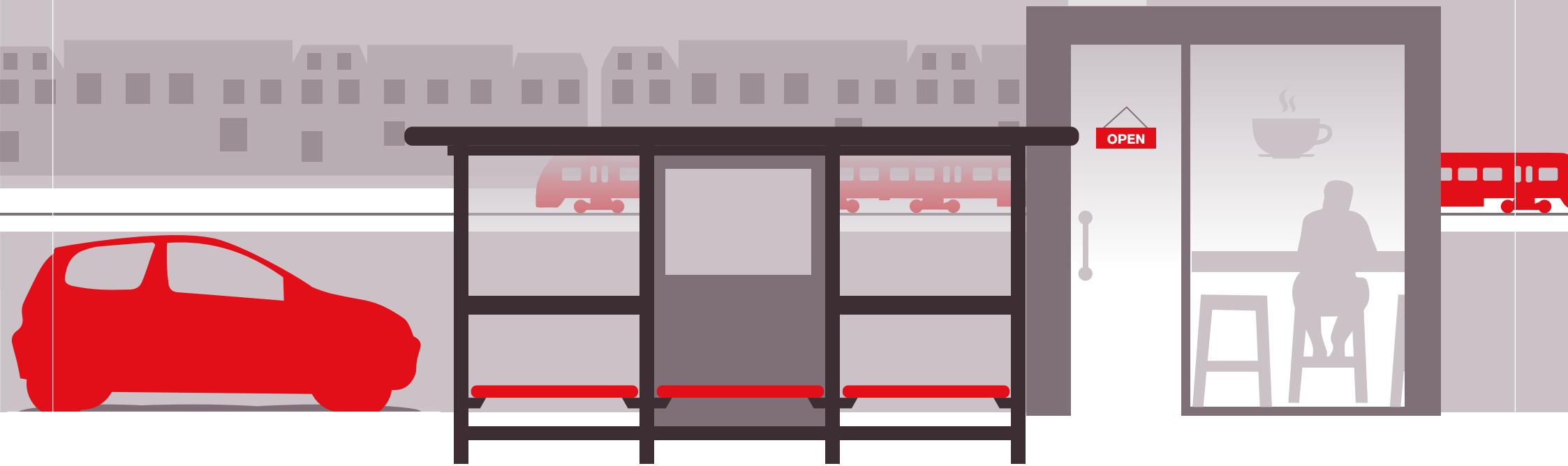


# Covid-19 travel segmentation

April 2021



# Introduction

**For almost a year Transport Focus has been talking to people about their views and concerns in the wake of the pandemic. We shared this insight with Governments and transport operators.**

Our *Travel During Covid-19* survey tracked behaviours, journey satisfaction and attitudes as the course of the pandemic and restrictions changed, and people have been both affected and adapting to these shifts.

This has provided key insights, like the gap between the experiences of people using public transport and the perceptions of those who have stayed away. While the vast majority of people travelling by public transport have felt safe, often less than half of those that haven't travelled say they would feel safe if they did.

Now, as restrictions begin to ease, we are digging deeper into our *Travel During Covid-19* survey. This segmentation analysis provides a new understanding of how people are feeling about public transport now and in the future.

It breaks the population down into five main groups according to key behaviours and attitudes, including how concerned they are about Covid-19, current and former use of public transport and how likely they are to return in the future. These groups have then been profiled and described demographically.

This analysis can help build a picture of the future market for public transport. This includes the types of people that may return to public transport first, or those who will need the most reassurance or incentives to consider

public transport again. It provides an insight into the challenge facing public transport. It highlights the need to ensure that, when the time is right, people are able to consider public transport again, and to ensure they feel safe and confident when they choose to travel.

This report introduces the five segments and will act as a 'reference manual' as we apply the segmentation to our weekly *Travel During Covid-19* survey. Our ongoing analysis will show how different segments respond to concepts, messaging, incentives, triggers and initiatives as restrictions ease or travel rules change. We will track and update the segments, monitoring shifts in their size and make-up, as restrictions ease in the coming weeks and months.

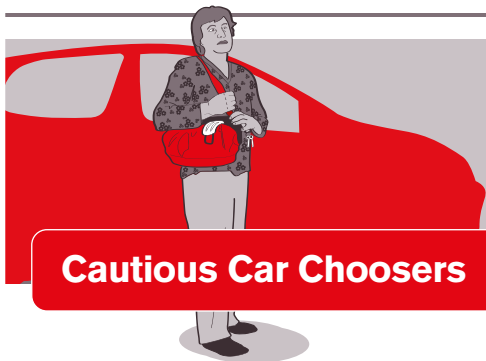
# Meet our segments



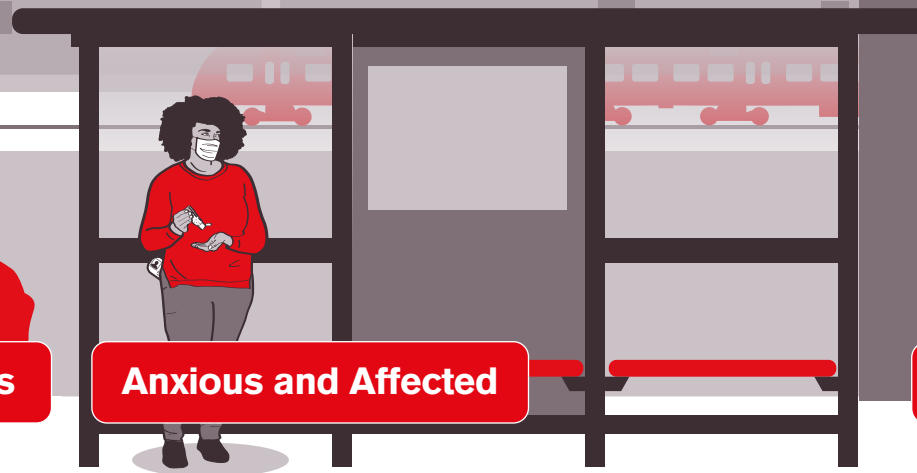
**Rethinking Reducers**



**Carefree and Carrying on**



**Cautious Car Choosers**



**Anxious and Affected**



**Spring-back Socialisers**



# Cautious Car Choosers



Are more likely to own a car and already used it rather than public transport before March 2020. They are more likely than others to think that public transport is not for someone like them.



They are anxious about using all modes of public transport. Covid has made them rethink how they will use public transport in the future. They also say that they will never again feel completely comfortable travelling on public transport. They are less likely than others to want to return to places such as non-essential shops, pubs and restaurants once they have reopened.



They are more likely to be women and to be older (65+), retired, white, have a long-term physical/mental condition or a disability, and live in rural areas.



# Anxious and Affected



Are more likely to be reliant on public transport. They used public transport regularly before March 2020 but do not expect to be using it as much in the future.



Tend to feel more anxious than others about travelling on all modes of public transport and don't feel that enough is being done to ensure safety on public transport.



More likely to be women, be in Black, Asian or minority ethnic groups, have a long-term physical/mental condition or a disability, have lower household incomes than the average, and live in urban areas/London.



## Rethinking Reducers



Are more likely to have used public transport before March 2020, but they don't expect to use it as much in the future.



They are more likely to say that they will never again feel completely comfortable travelling on public transport. They are more likely to be rethinking their future use of public transport. They are less likely than others to want to return to places once they have reopened.



They are more likely to be aged 18-44, be in Black, Asian or minority ethnic groups, be working full time and be in higher social grades or have higher household incomes than the average. They are more likely to have children under 18 years of age at home and to live in urban areas/ London.

OPEN



## Spring-back Socialisers



Are more likely to be previous public transport users who expect to use it in the future as much as they were previously. Are more likely to use public transport to return to their regular activities, which they are likely to do soon after places open.



They are less anxious than others about using public transport and more likely to feel that enough is being done to ensure safety on public transport.



They are more likely to be male, be older than others (65+), retired, white, and to be in higher social grades or have higher household incomes than the average.



## Carefree and Carrying on



Are more likely than others to have been using public transport recently and to expect to use it in the future as much as they were before March 2020. They expect to use public transport again for their regular activities, which they are likely to do soon after places open.



They are the least anxious about using public transport and more likely to believe enough is being done to ensure safety on public transport.



They are more likely to be male, to be younger (25-34), to be working full time and to have children under 18 living at home.



# How we created the segments

We used the nationally representative Travel During Covid-19 tracker to survey more than 4000 people between 12 and 21 February 2021. We asked additional questions to better understand people's former, current and expected future usage and attitudes towards public transport. We published a summary here - [Travel during Covid-19: attitudes to travel post lockdown](#).

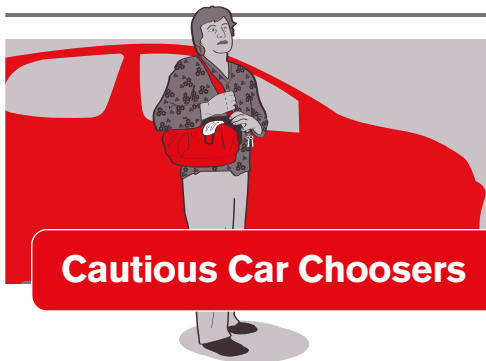
You can find more detail on the segmentation [here](#).



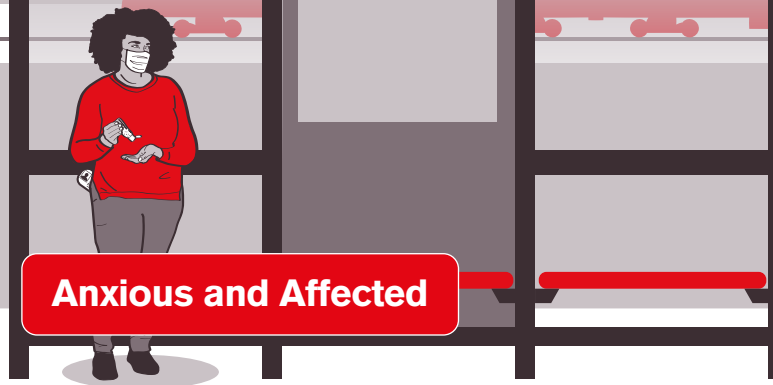
**Rethinking Reducers**



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**Cautious Car Choosers**



**Anxious and Affected**



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## Contact Transport Focus

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Transport Focus is the operating name of the Passengers' Council

**Transport Focus is the independent consumer organisation representing the interests of:**

- bus, coach and tram users across England outside London
- rail passengers in Great Britain
- all users of England's motorways and major 'A' roads (the Strategic Road Network).

**We work to make a difference for all transport users.**