



TRANSPORT FOCUS

# Covid travel segmentation

April 2021

**.YONDER**





# Project background and methodology

## Background

Transport Focus has been running a Covid travel tracker since May 2020, tracking passenger usage, attitudes and perceptions of using various modes of travel during the Covid pandemic. More recently it has been looking to get a forward-looking view from this research to understand those who might be likely to return to public transport first and when.

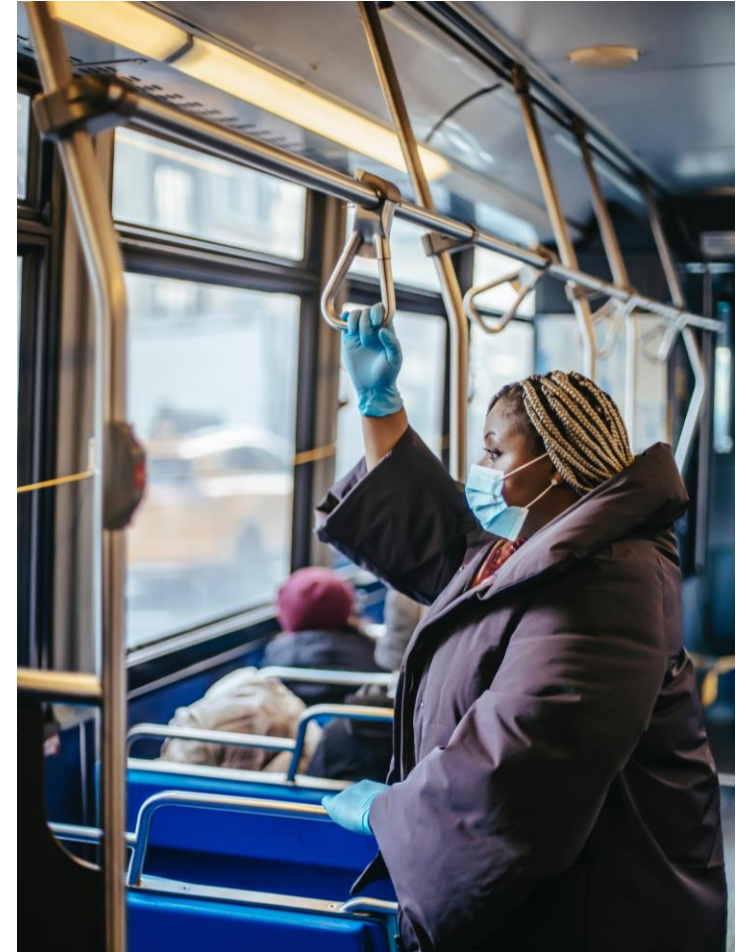
The segments will help to understand different parts of the (former and future) market demographically, and then target specific questions to the segments in order to see what type of messaging or other interventions or triggers might change their behaviour in the longer term.

The segments will be tracked going forward to understand shifts as time goes on and various Covid related factors change.

## Methodology

This report presents results of segmentation.

- **Data collection:** Yonder's online omnibus survey
- **Sample:** Nationally representative of Great Britain
- **Sample size:** 4021
- **Fieldwork dates:** 12-14 and 19 – 21 February 2021

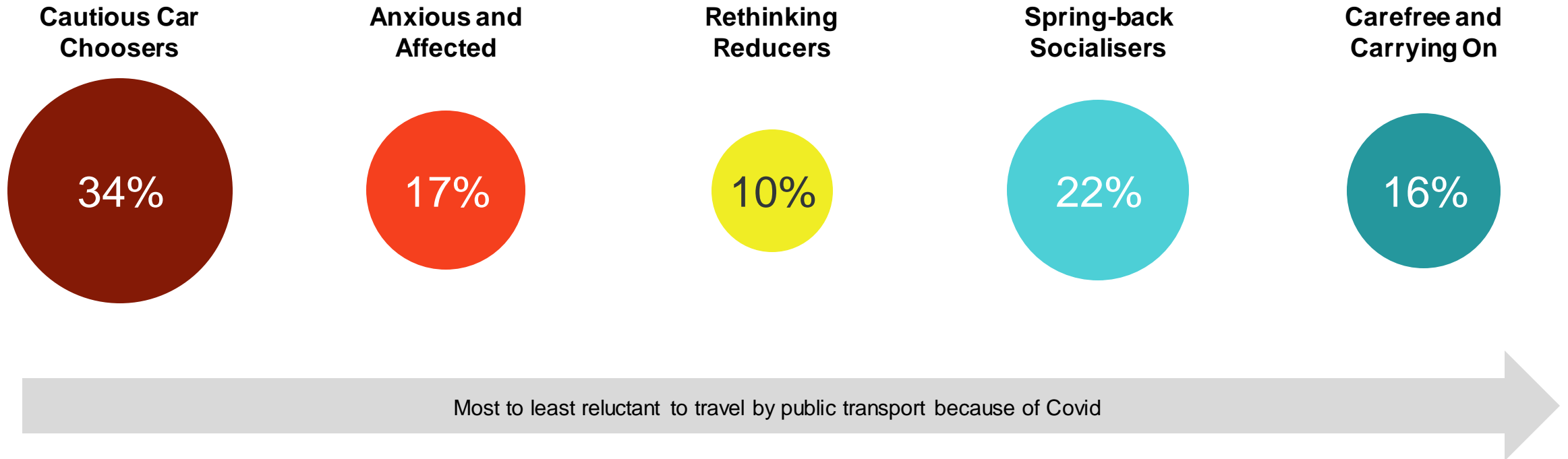




# **Introducing the segments**

# We have arrived at a five segment solution...

---



# We have arrived at a five segment solution...

Cautious Car Choosers (34%)	Anxious and Affected (17%)	Rethinking Reducers (10%)	Spring-back Socialisers (22%)	Carefree and Carrying On (16%)
<ul style="list-style-type: none"> <li>▪ Very concerned about Covid</li> <li>▪ Will never again feel safe or comfortable outside</li> <li>▪ Reluctant to use public transport again</li> <li>▪ Mainly car drivers – will use car more</li> <li>▪ Don't actually use bus or train that much to begin with</li> <li>▪ Over indexing on older/retired married women</li> </ul>	<ul style="list-style-type: none"> <li>▪ Most concerned about Covid</li> <li>▪ Concerned about financial situation</li> <li>▪ Most reliant on public transport – and they don't think enough is being done</li> <li>▪ Least likely to use / have access to a car</li> <li>▪ Not in a rush to go back anywhere</li> <li>▪ Most likely to be in council accommodation and non-white, lowest income group</li> <li>▪ Younger so less likely to have had vaccine</li> </ul>	<ul style="list-style-type: none"> <li>▪ Don't feel comfortable on public transport or public spaces</li> <li>▪ Most likely to rethink how they'll use public services in the future</li> <li>▪ Least likely to want to go out again (incl shops, pubs, gyms)</li> <li>▪ Most likely to want to change travel behaviour – but much more car and much less taxi, bus and train. Much more walking!</li> <li>▪ Younger group – most likely to be furloughed</li> <li>▪ Higher income / social grade</li> </ul>	<ul style="list-style-type: none"> <li>▪ Have been avoiding unnecessary travel due to Covid</li> <li>▪ But happy to go back to normal on once restrictions are lifted</li> <li>▪ More relaxed than anxious about travelling – broadly feel safe</li> <li>▪ Mostly likely to go back to restaurants / pubs / shops</li> <li>▪ Satisfied enough is being done to make public transport safe</li> <li>▪ Most likely to be white, male, retired, good income</li> </ul>	<ul style="list-style-type: none"> <li>▪ Feel safe and relaxed about travelling again</li> <li>▪ Commuters - won't change behaviour</li> <li>▪ Most likely to currently be furloughed or working</li> <li>▪ Younger group – under 34</li> <li>▪ More likely C2</li> </ul>

# Segment profiling

# Cautious Car Choosers



# Cautious Car Choosers

## All about me...

34%

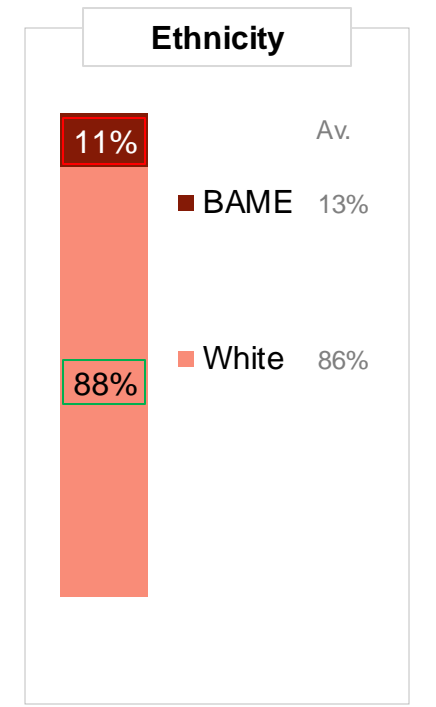
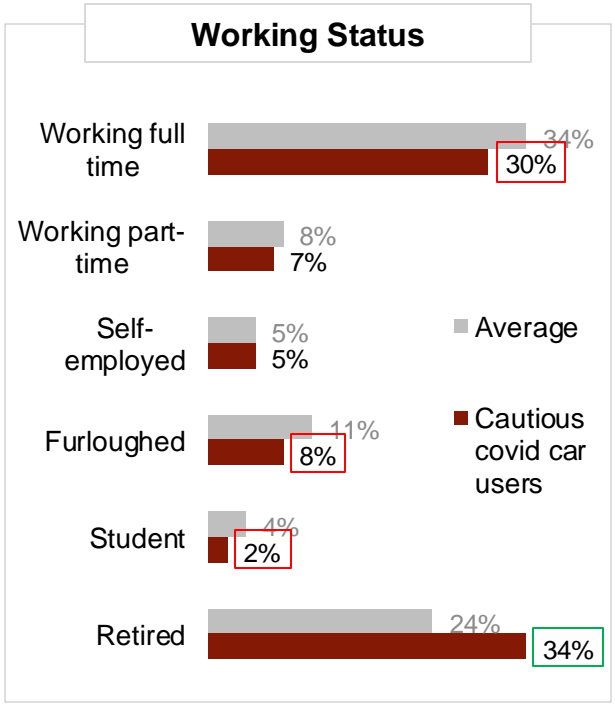
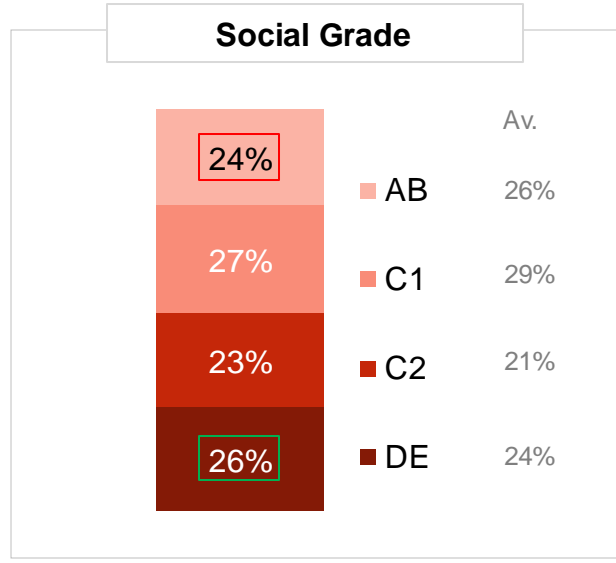
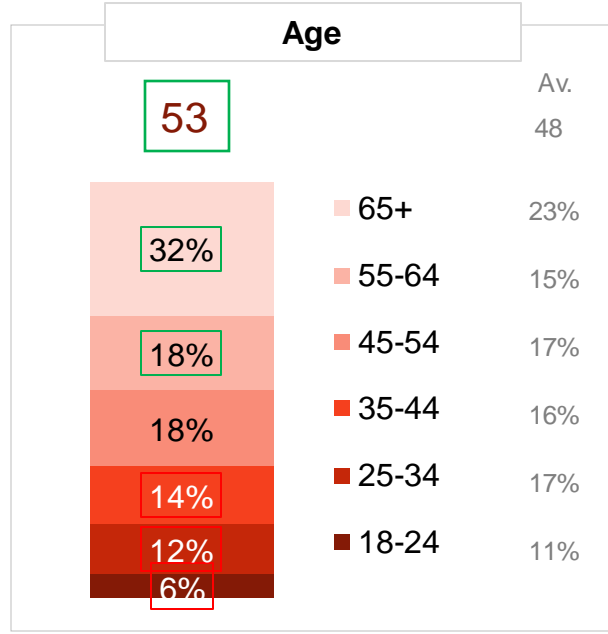
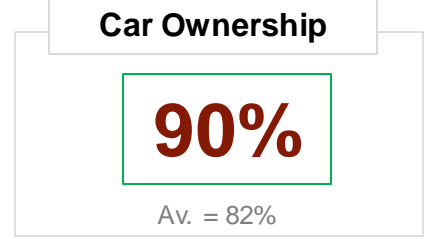
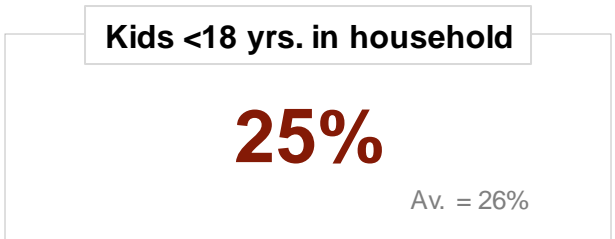
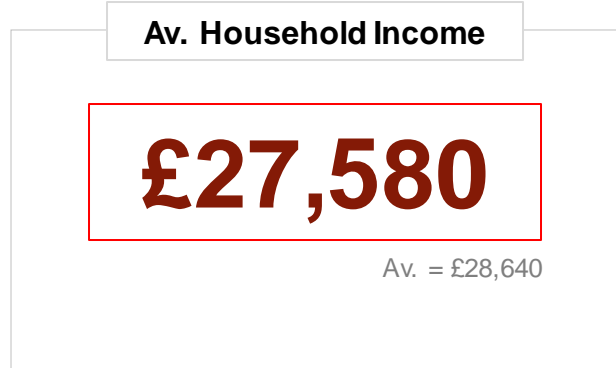
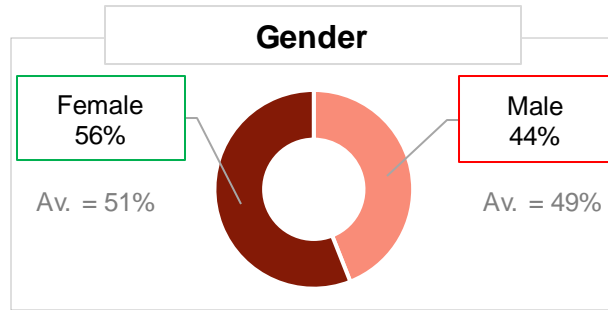
*Cautious Car Choosers are more likely to be **female, older and retired**. While they are more likely to have a **longstanding physical/mental condition/disability and be vulnerable to Covid**, they are also more likely to **have been vaccinated**. This group are more likely to live in **rural areas**.*

*Nine in 10 Cautious Car Choosers **own a car** and they were more likely to **drive regularly** pre-Covid, with 8 in 10 using it at least monthly before Covid. Nearly half believe **public transport is not for people like them**, significantly higher than average. Post-Covid, they plan to drive even more. After restrictions lift, Cautious Car Choosers do not expect to use the same levels of public transport as pre-Covid and are less likely to be happy to use public transport for regular activities.*

*This group are **significantly more anxious** about using all types of public transport compared to the average and believe the pandemic has made them rethink how they will use transport in the future as they believe they will **never again feel completely comfortable on public transport**. The group are **more likely to be reluctant returning to places** once they open.*



# Cautious Car Choosers (34%) are more likely to be female, older and retired. Nine in 10 own a car



# They are more likely to have a disability and live in rural areas. They are more likely to have been vaccinated

Longstanding physical/mental condition/disability

**28%**

Av. = 23%

Urban vs Rural

Urban **75%** Rural **25%**

Av. = 82%

18%

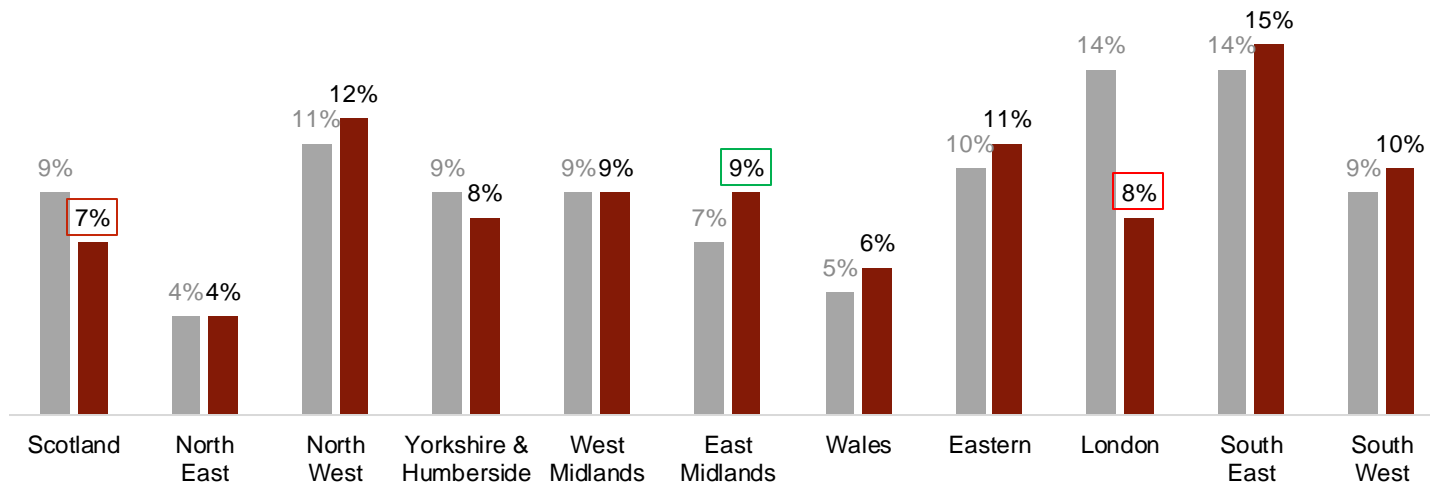
Personally vaccinated

**38%**

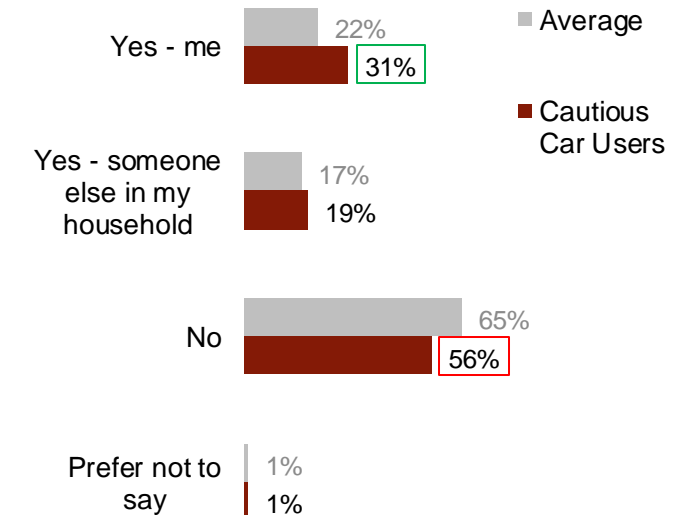
Av. = 31%

Region

■ Average ■ Cautious Car Choosers



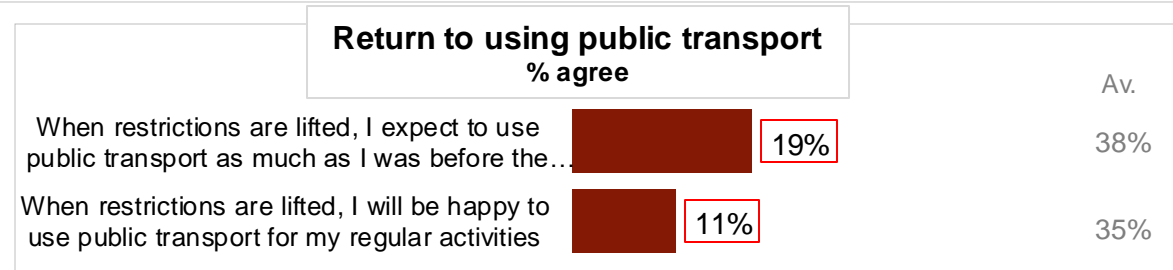
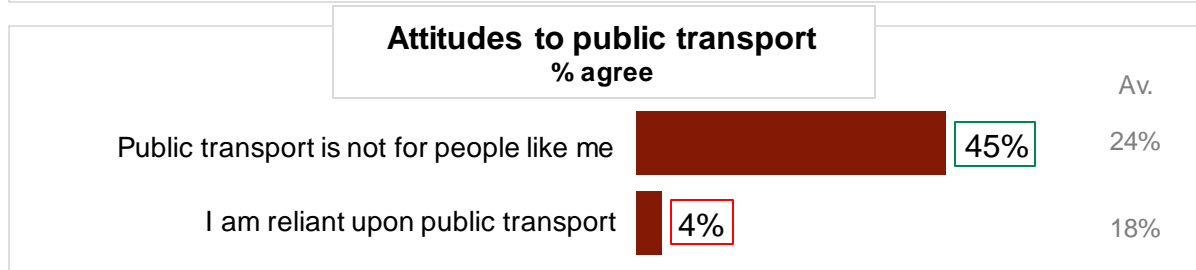
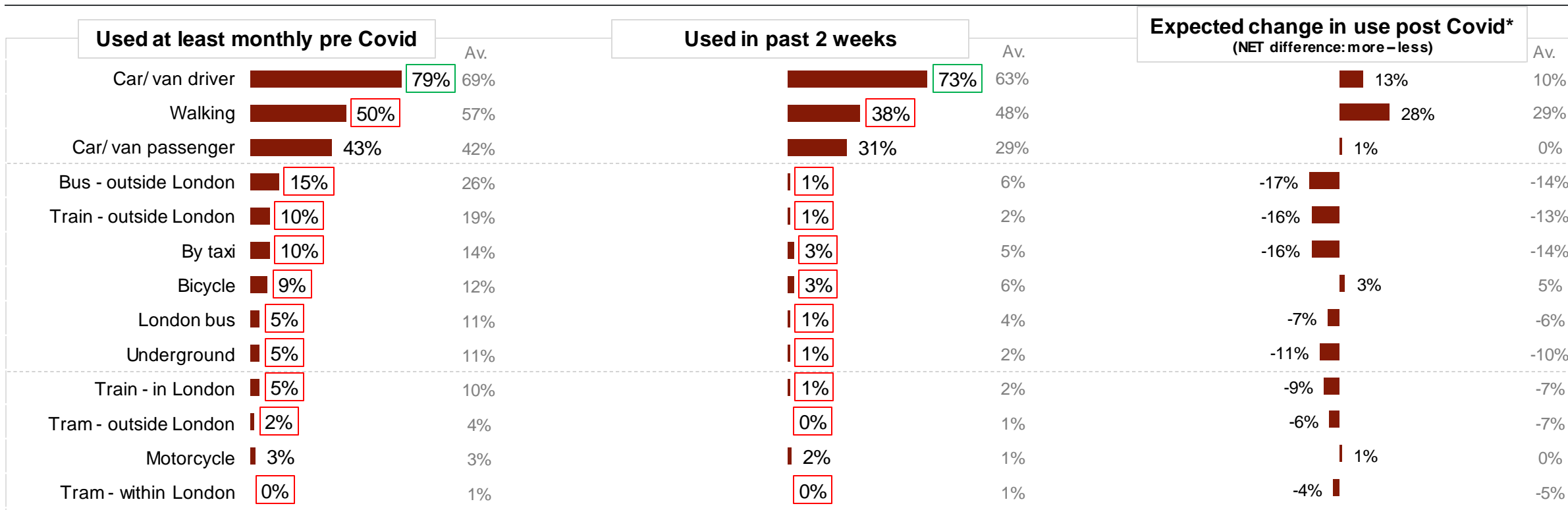
Someone in household is Covid vulnerable



34%

Transport habits

# Cautious Car Choosers believe public transport is not for them and will usage will be the same as pre-Covid

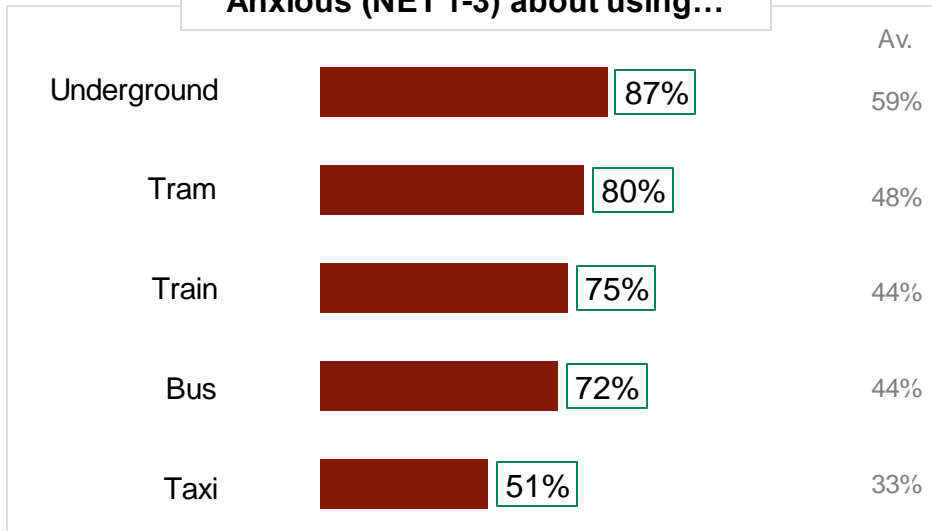


\*This chart does not highlight significant differences  
Q1. Past usage, Q2. Current usage, Q3. NEW8. Expected change in usage, Q4.10 Public transport attitudes. Base: All respondents/Use transport (4021/3979), Cautious Car Choosers (Segment 2) (1338/1296)

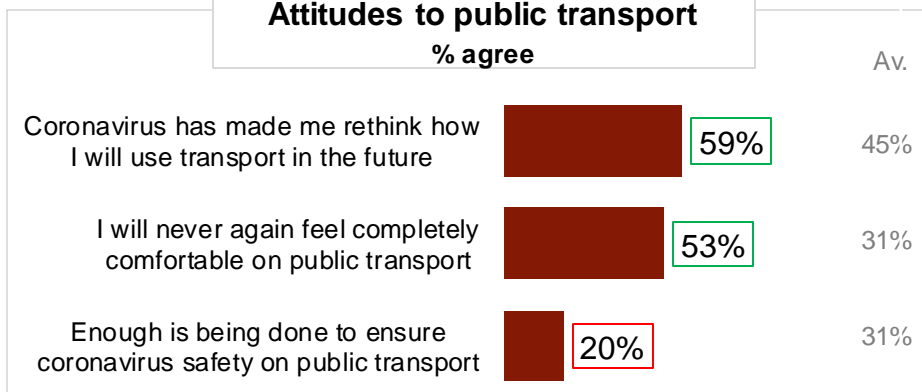
  Significantly higher/lower  
  than total at 95% confidence

# They are most anxious about travelling on the underground and the pandemic has made them rethink how they will use transport in the future

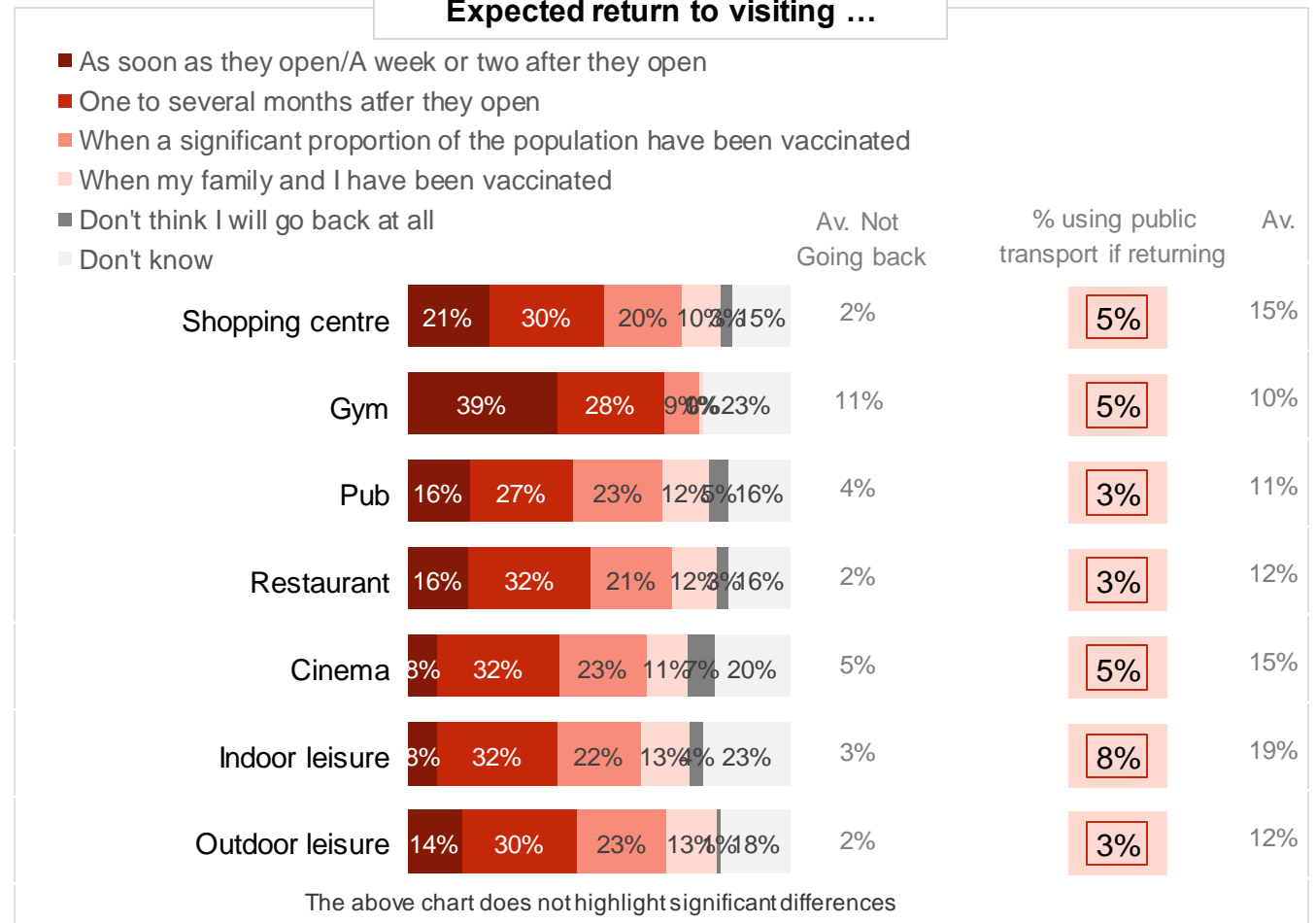
## Anxious (NET 1-3) about using...



## Attitudes to public transport



## Expected return to visiting ...



# **Anxious and Affected**



# Anxious and Affected All about me...

17%

*This segment are **reliant on public transport** and **anxious about returning** to all modes of public transport. They are **rethinking their use of public transport** and are **reluctant to return** to pre-Covid levels of use.*

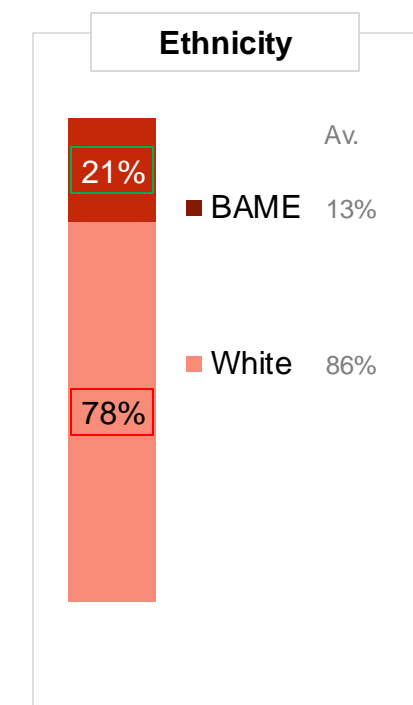
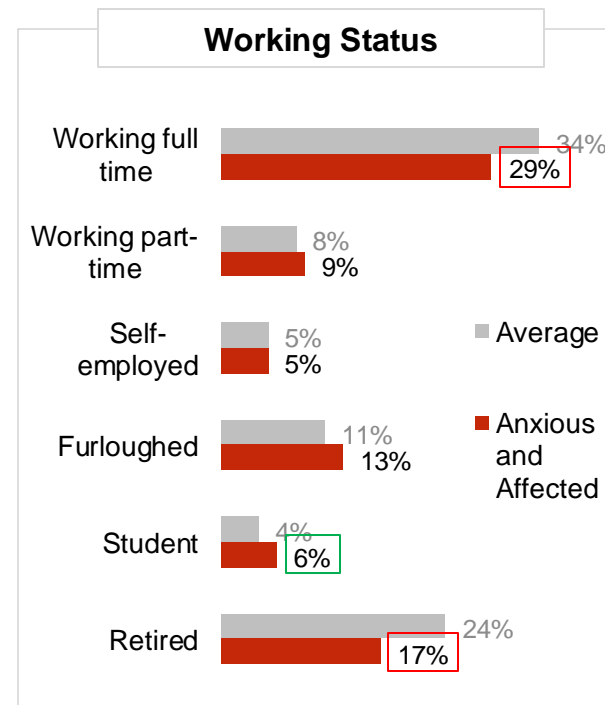
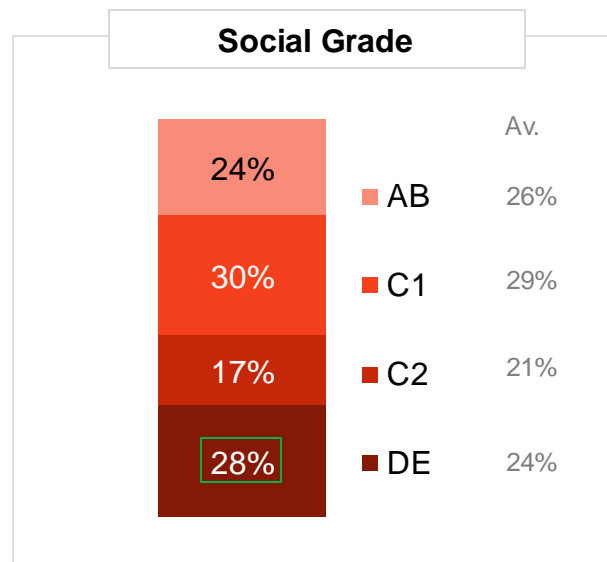
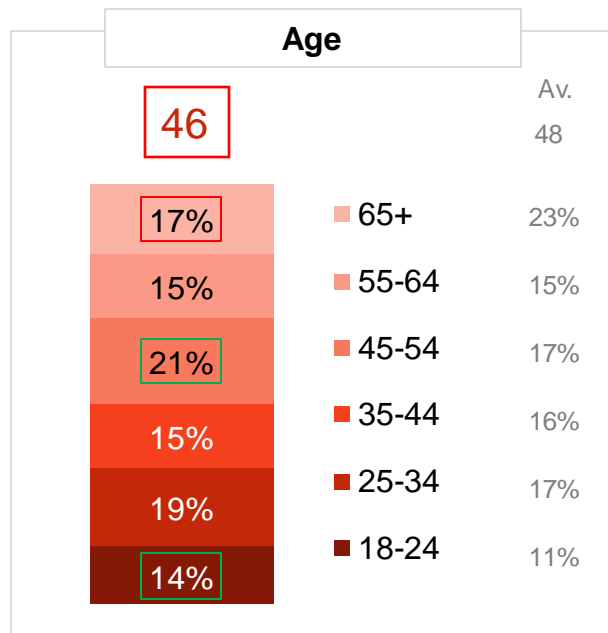
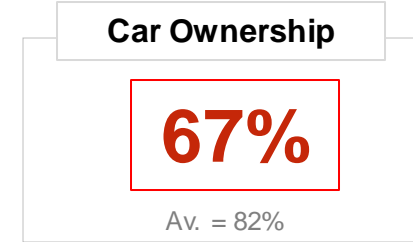
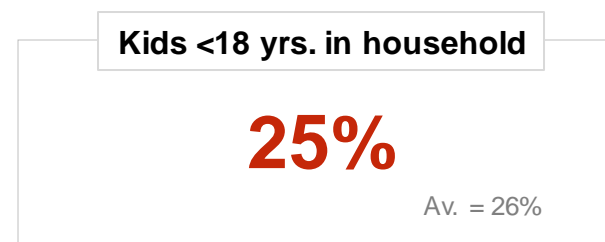
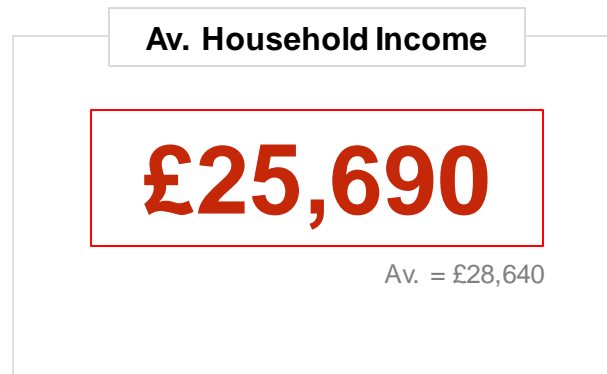
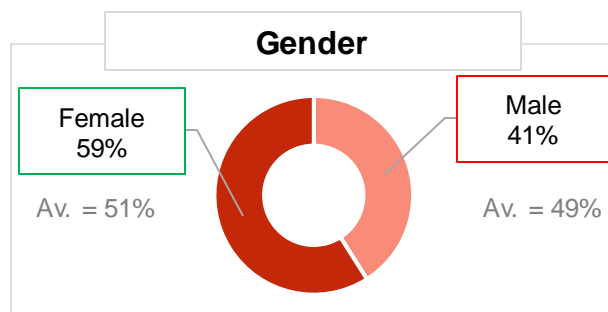
*They are more likely to be **younger, female, BAME** with **less household income** and within a **lower SEG**. They are more likely to live in **urban** areas and especially **London**. They are more likely to have a longstanding physical/mental condition/disability but are not necessarily more vulnerable to Covid themselves. They are **less likely to have had a vaccination**.*

*Anxious and Affected are **less likely to own a car** and to have driven pre-Covid. They used most other modes of transport more pre-Covid and in the past 2 weeks have relied more on walking, cycling, buses and taxis. They are more likely to **use most modes of public transport less** when restrictions ease and Covid no longer pose a threat. They **don't feel like enough is being done** to ensure Covid safety on public transport.*

17%

Demographics

# Anxious and Affected (17%) are more likely to be younger, female, BAME, lower SEG and have less income



17%

Demographics

# They are more likely to live in urban areas and especially London. They are less likely to have been vaccinated

Longstanding physical/mental condition/disability

29%

Av. = 23%

Urban vs Rural

Urban 87% Rural 13%

Av. = 82% 18%

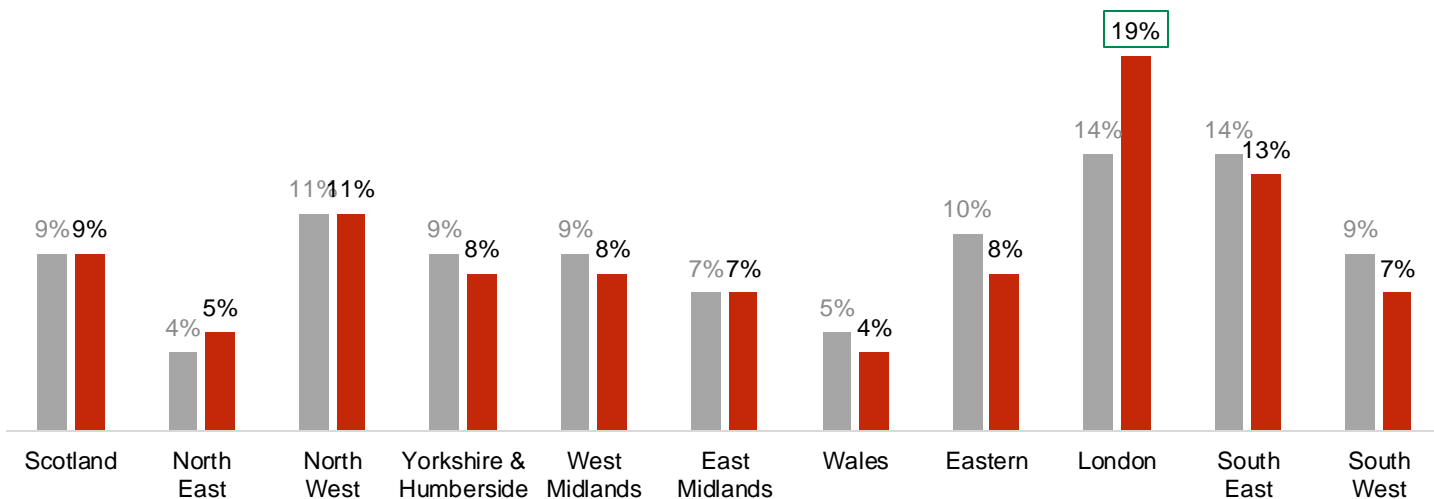
Personally vaccinated

23%

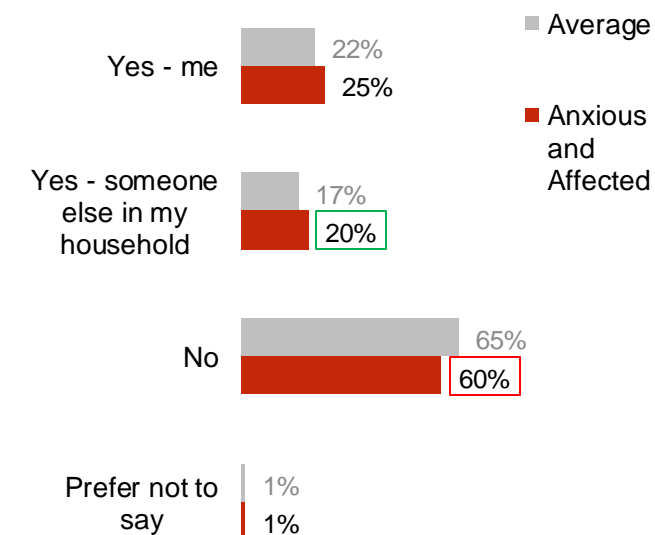
Av. = 31%

Region

Average Anxious and Affected



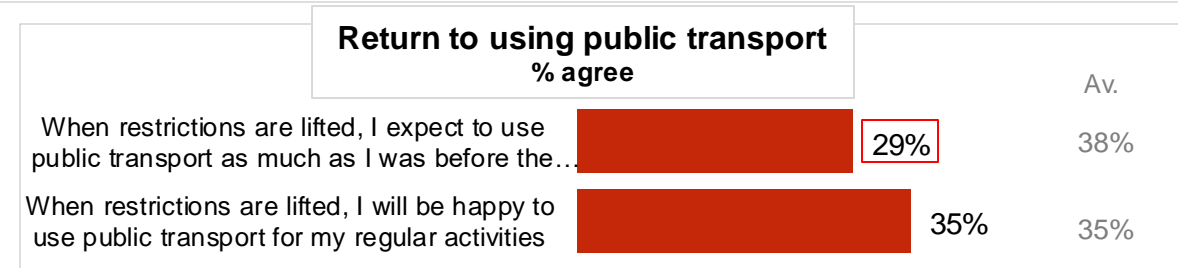
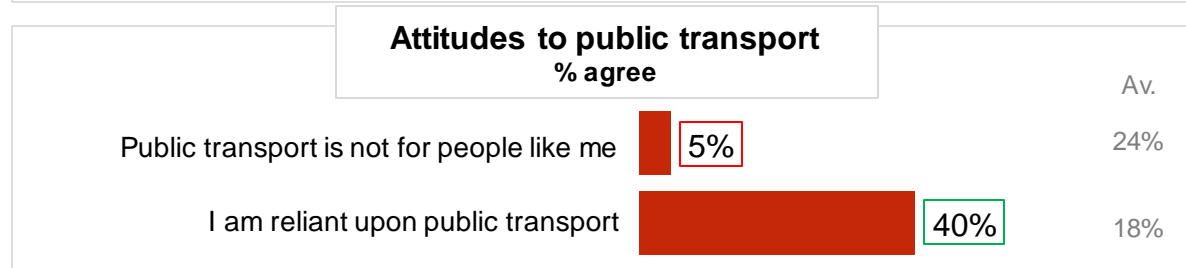
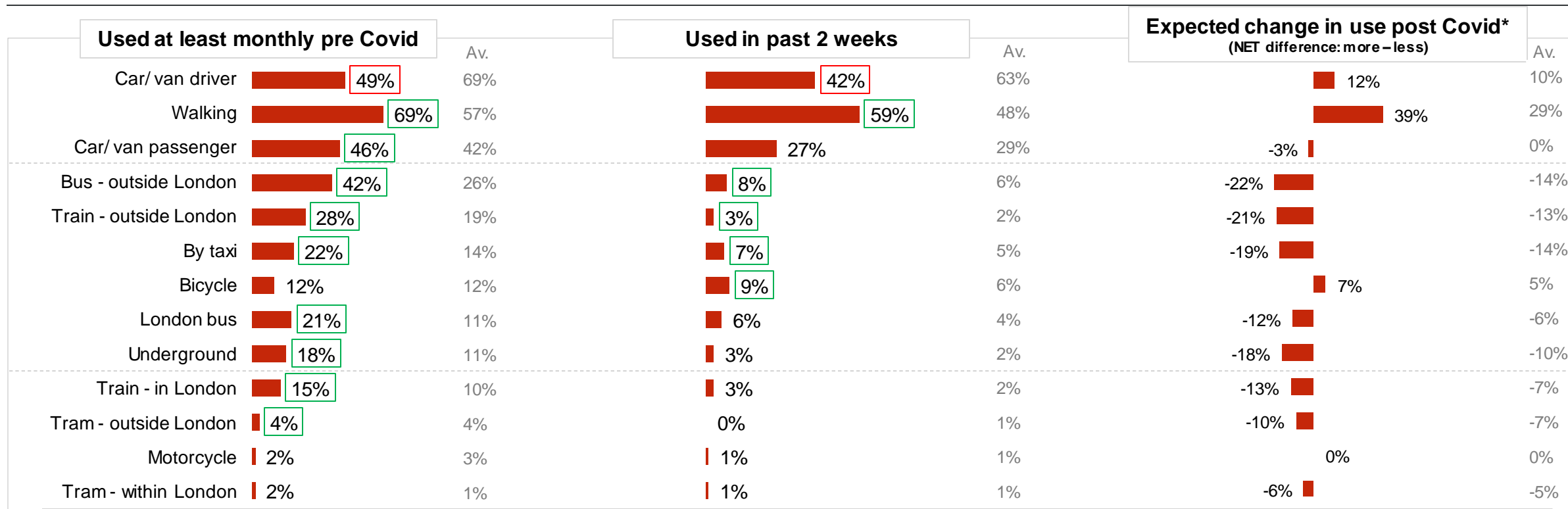
Someone in household is Covid vulnerable



17%

Transport habits

# Anxious and Affected are more reliant on public transport but are expecting to use most modes less post Covid



\*This chart does not highlight significant differences  
Q1. Past usage, Q2. Current usage, Q3. NEW8. Expected change in usage, Q4. Public transport attitudes. Base: All respondents/Use transport (4021/3979), Anxious and Affected (Segment 3) (725/725)

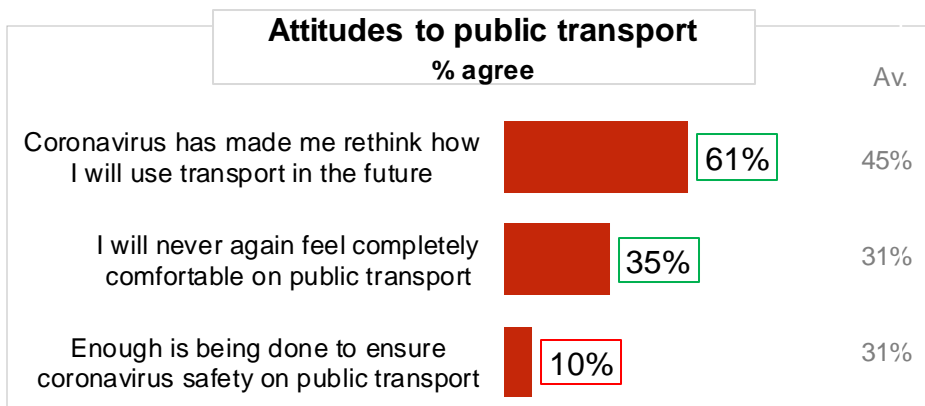
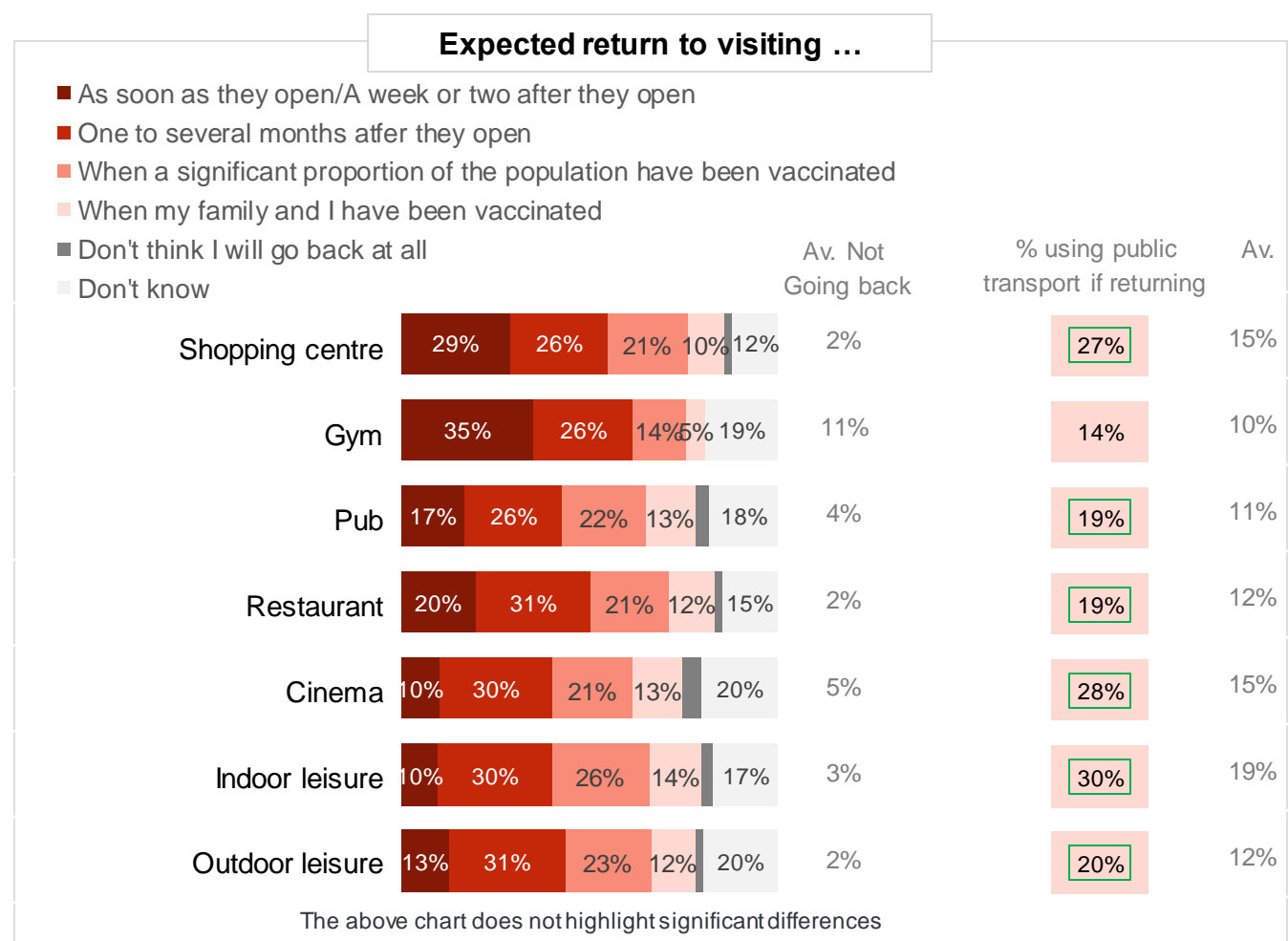
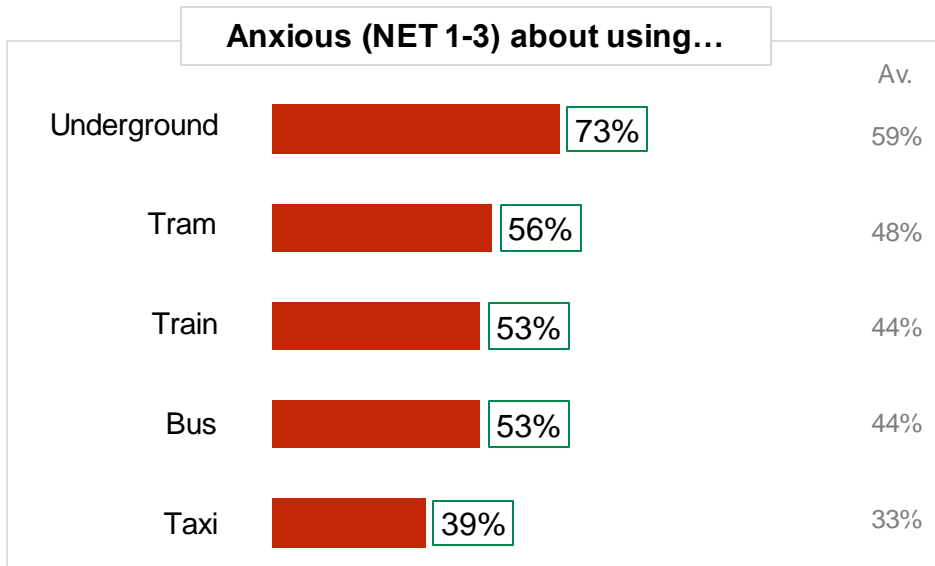
  Significantly higher/lower  
  than total at 95% confidence

# They tend to be more anxious about travelling on all modes of public transport as a result of Covid and don't feel like enough is being done to ensure safety on public transport

Anxious and Affected

17%

Concerns / Return



# Rethinking Reducers



# Rethinking Reducers

## All about me...

---



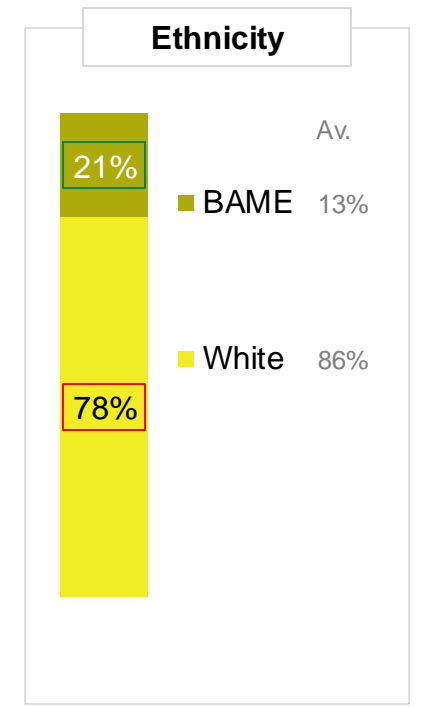
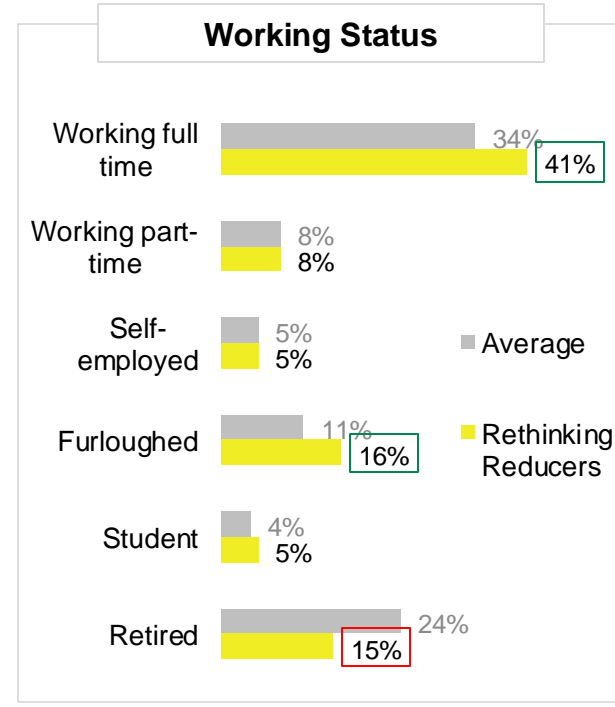
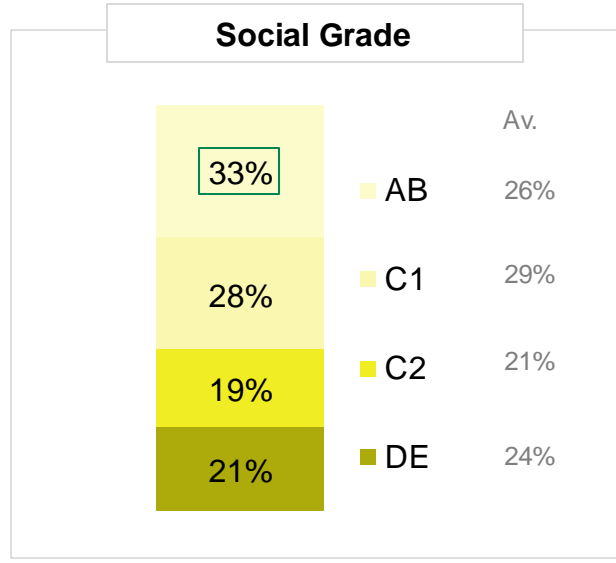
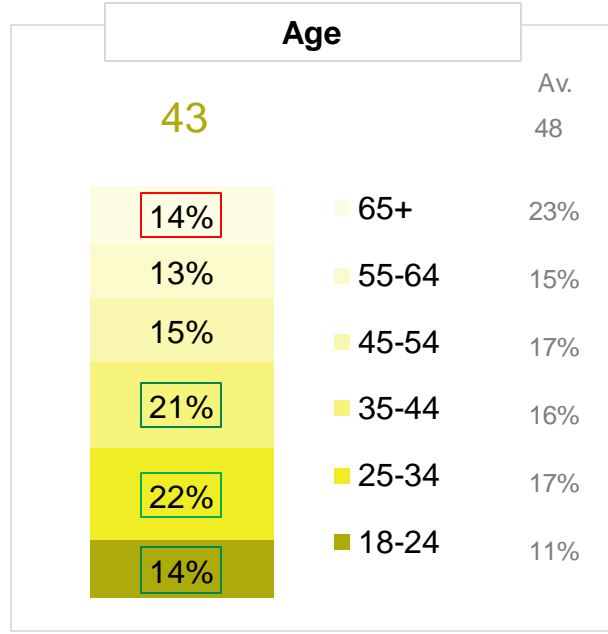
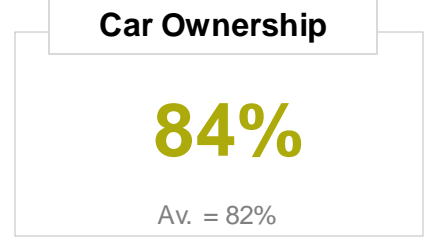
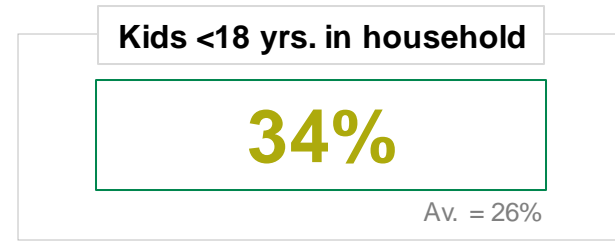
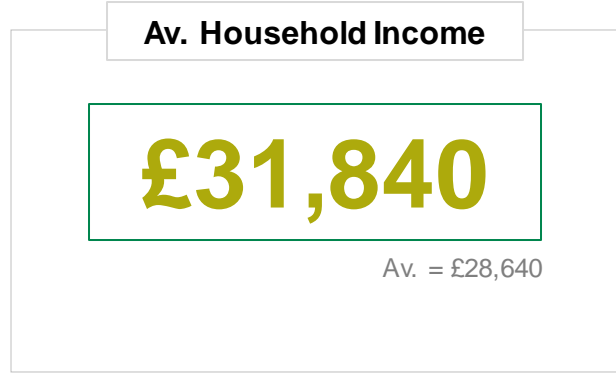
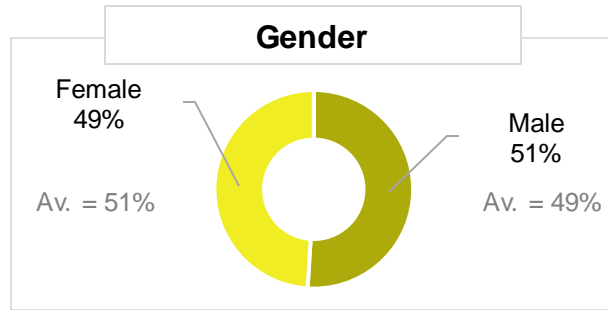
10%

*Rethinking Reducers are more likely likely to be **18-44 years old** and have **children in their household**. They are more likely to be **BAME**, **working full-time** or **furloughed**, have a **higher income** and be in a **higher SEG**. The group are significantly more likely to live in an **urban area**, particularly in **London**.*

*They are more likely to have used London trains and buses pre-Covid and more recently. They believe **public transport is not for them but are fairly reliant on it**. This group are also likely to **reduce their usage** after lockdown and are **less likely to be happy** using public transport for regular activities.*

*Even though they believe enough is being done to ensure coronavirus safety on public transport, Rethinking Reducers **don't feel comfortable on public transport or public spaces** and are most likely to **rethink how they'll use public services in the future**. They are least likely to want to go out in public spaces again.*

# Rethinking Reducers (10%) are more likely to be 18-44 years old, BAME, higher SEG and have more income





# They are more likely to live in urban areas and especially in London. They are less likely to have been vaccinated

Longstanding physical/mental condition/disability

**20%**

Av. = 23%

Urban vs Rural

Urban **87%** Rural **13%**

Av. = 82% 18%

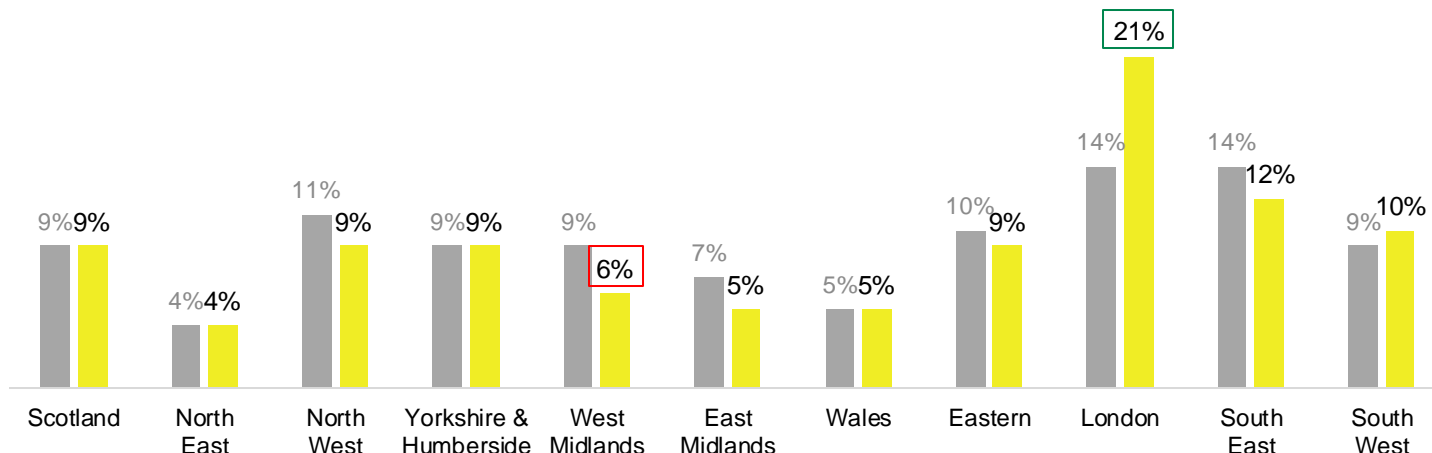
Personally vaccinated

**27%**

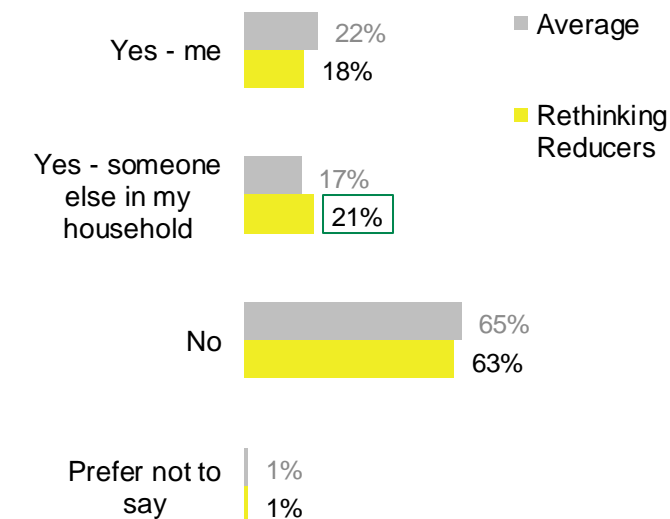
Av. = 31%

Region

■ Average ■ Rethinking Reducers



Someone in household is Covid vulnerable



# While Rethinking Reducers are fairly reliant on public transport they don't expect to use the same levels post Covid

Used at least monthly pre Covid		Used in past 2 weeks		Expected change in use post Covid* (NET difference: more-less)	
	Av.		Av.		Av.
Car/ van driver	68%	62%	63%	11%	10%
Walking	52%	43%	48%	39%	29%
Car/ van passenger	40%	31%	29%	1%	0%
Bus - outside London	23%	5%	6%	-26%	-14%
Train - outside London	21%	2%	2%	-20%	-13%
By taxi	16%	7%	5%	-24%	-14%
Bicycle	14%	6%	6%	9%	5%
London bus	15%	6%	4%	-13%	-6%
Underground	13%	4%	2%	-21%	-10%
Train - in London	18%	4%	2%	-14%	-7%
Tram - outside London	3%	1%	1%	-13%	-7%
Motorcycle	3%	1%	1%	0%	0%
Tram - within London	3%	1%	1%	-11%	-5%

Attitudes to public transport % agree		Av.
Public transport is not for people like me	31%	24%
I am reliant upon public transport	23%	18%

Return to using public transport % agree		Av.
When restrictions are lifted, I expect to use public transport as much as I was before...	33%	38%
When restrictions are lifted, I will be happy to use public transport for my regular activities	30%	35%

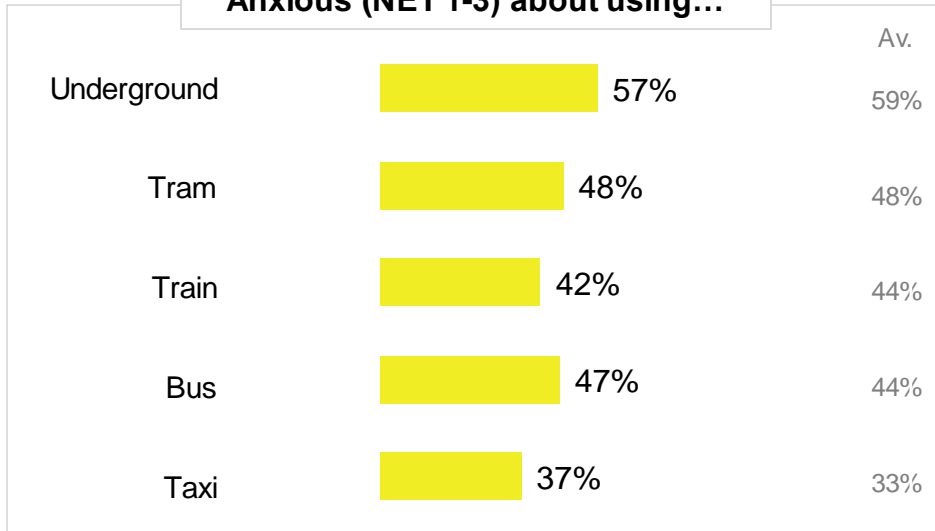
\*This chart does not highlight significant differences  
Q1. Past usage, Q2. Current usage, Q3. NEW8. Expected change in usage, Q4. Public transport attitudes. Base: All respondents/Use transport (4021/3979), Rethinking Reducers (Segment 5) (386/386)

Green box: Significantly higher/lower than total at 95% confidence  
Red box: Significantly higher/lower than total at 95% confidence

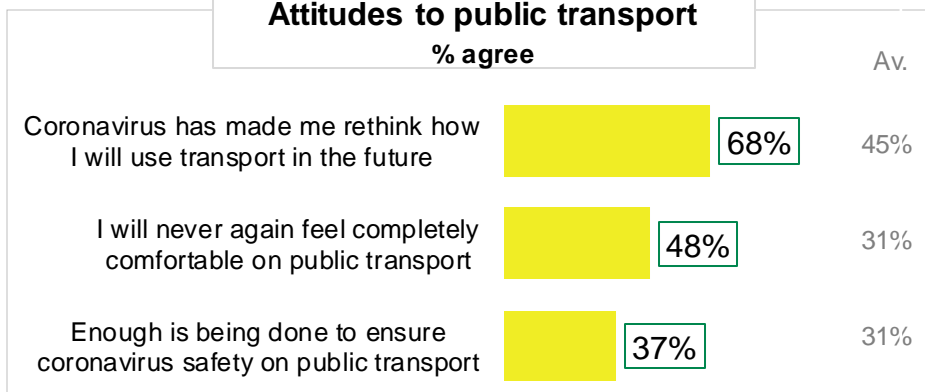
# They have average anxiety about travelling on public transport but the virus has made them rethink their future use. They are least likely to return once places open



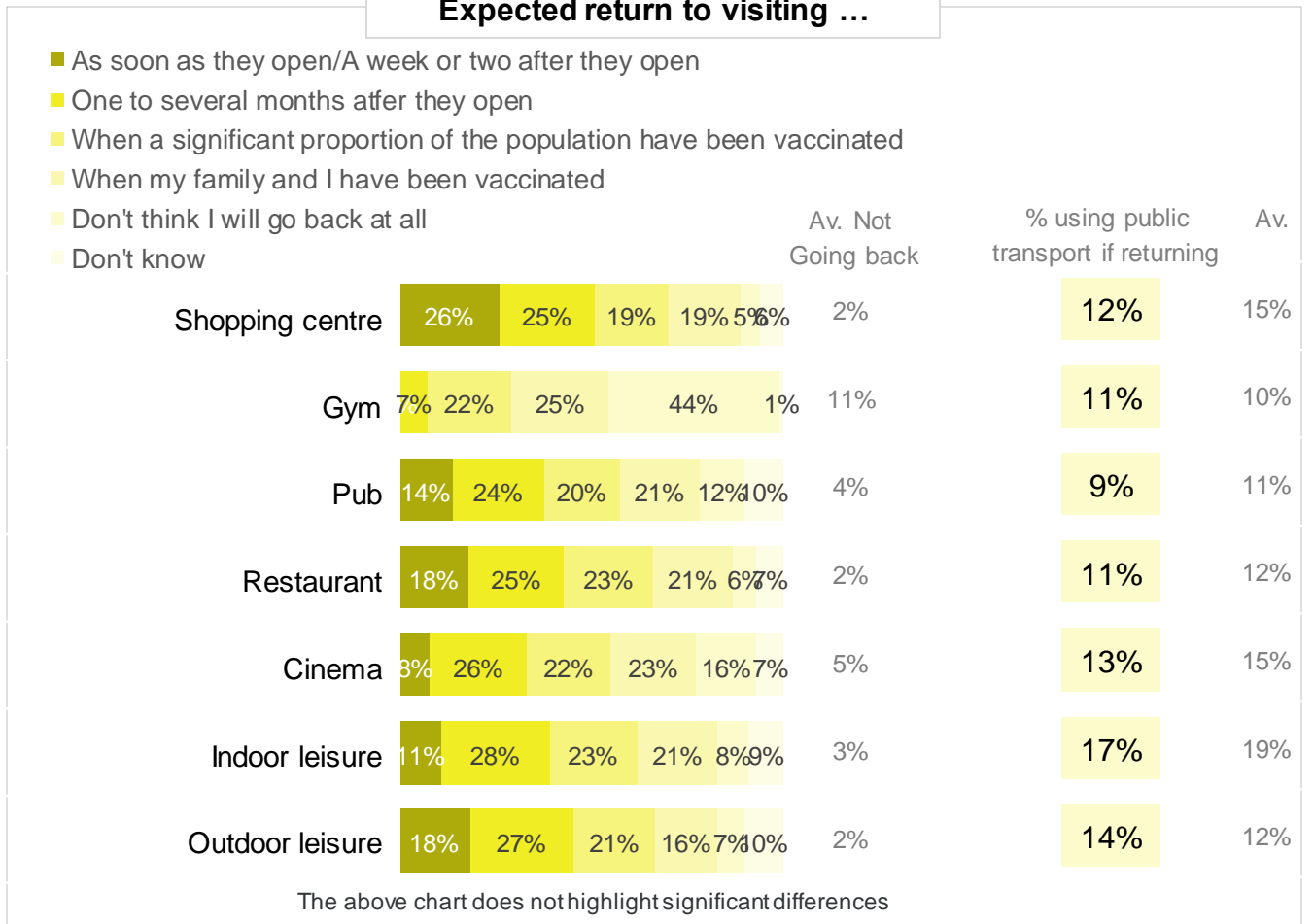
## Anxious (NET 1-3) about using...



## Attitudes to public transport % agree



## Expected return to visiting ...



# **Spring-back Socialisers**



# Spring-back Socialisers

## All about me...

---



22%

*Spring-back Socialisers are more likely to be **male, white, older** and have a **higher SEG** and **higher income**. This group are more likely to be **retired** and are less likely to have kids under 18 in their household. They are less likely to have a longstanding physical/mental condition/disability or be vulnerable to Covid but are more likely to have been vaccinated.*

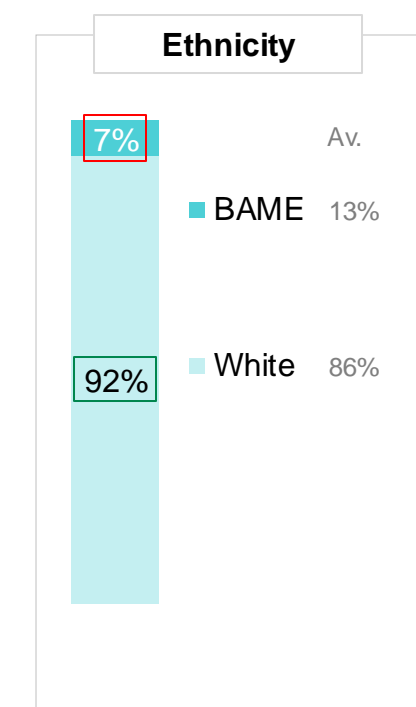
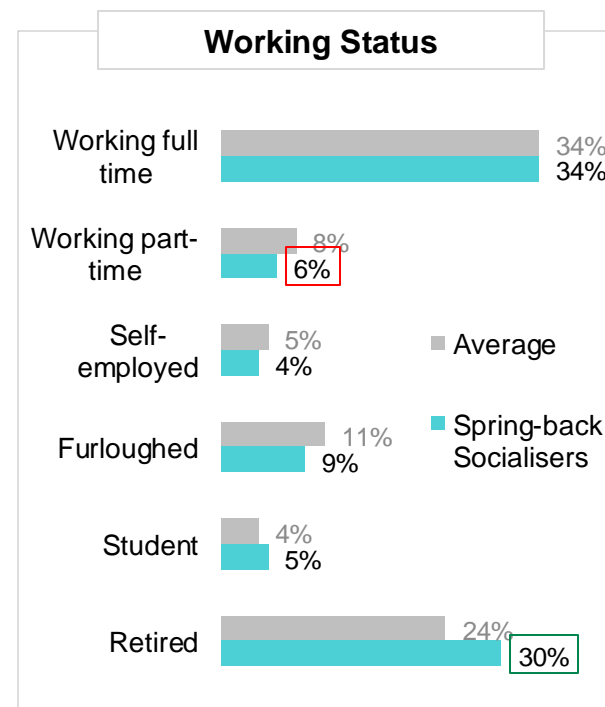
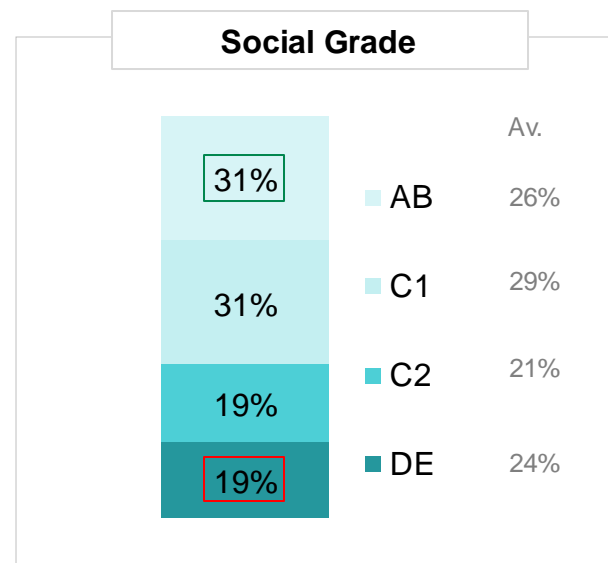
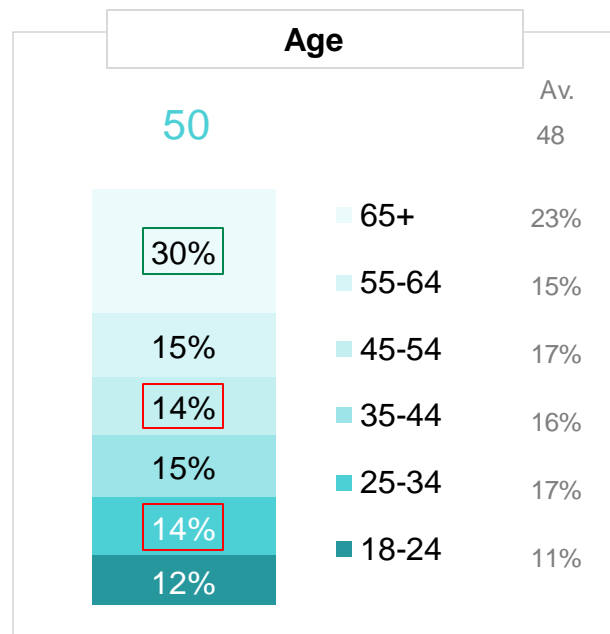
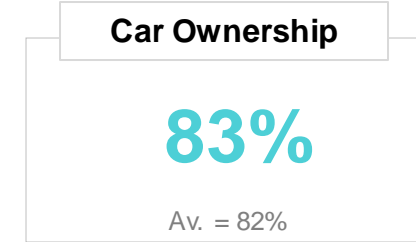
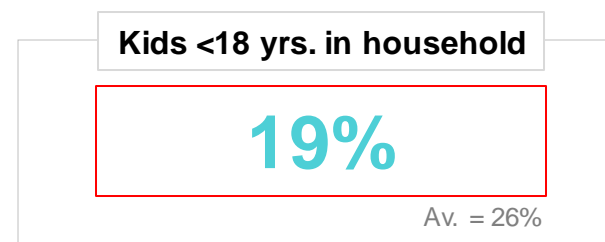
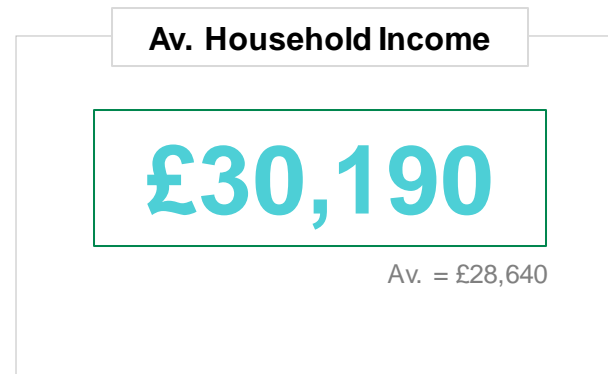
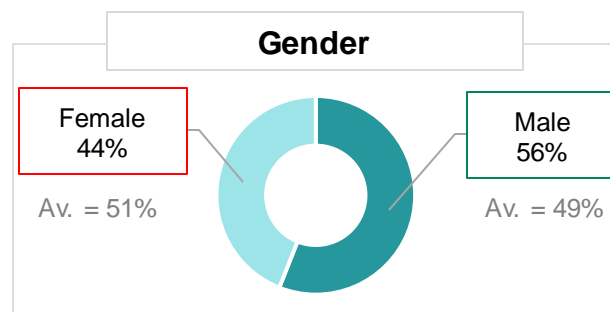
*The group are more likely to walk and use trains and buses outside of London. They are more likely to **return to pre-Covid levels of public transport** use after restrictions have lifted and will be **happy to use public transport again** for regular activities.*

*Spring-back Socialisers are **less anxious** about using all forms of public transport and feel enough is being done to ensure public transport is Covid friendly. The group are likely to return to places soon after they open, particularly shopping centres, restaurants and pubs.*

22%

Demographics

# Spring-back Socialisers (22%) are more likely to be male, older, have a higher SEG and have a higher income



22%

Demographics

# They are less likely to have a disability or be vulnerable to Covid but are more likely to have been vaccinated

Longstanding physical/mental condition/disability

16%

Av. = 23%

Urban vs Rural

Urban 83% 17% Rural

Av. = 82% 18%

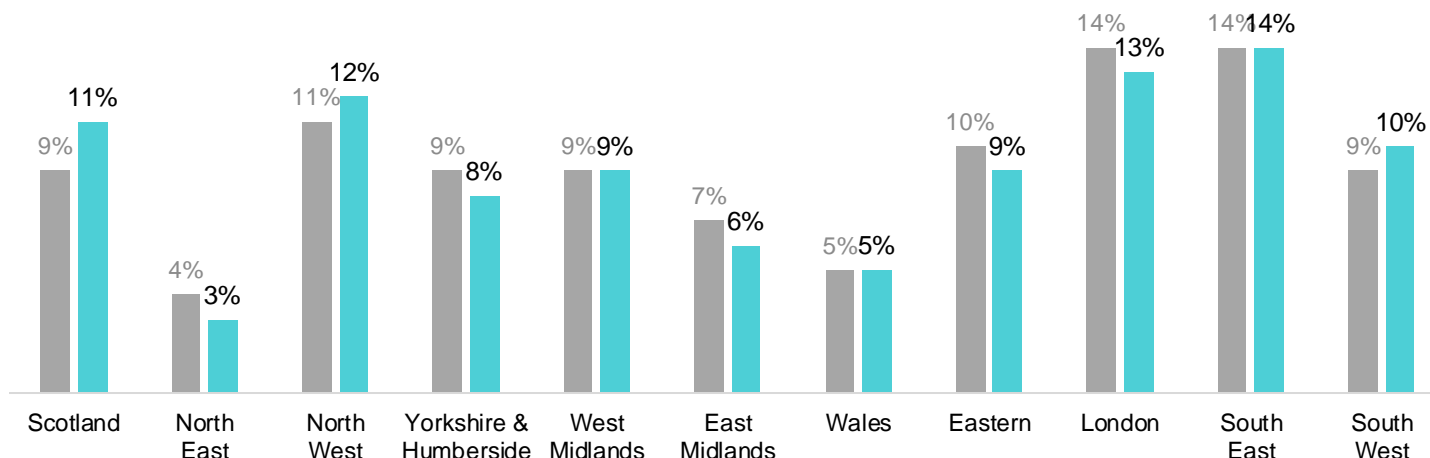
Personally vaccinated

36%

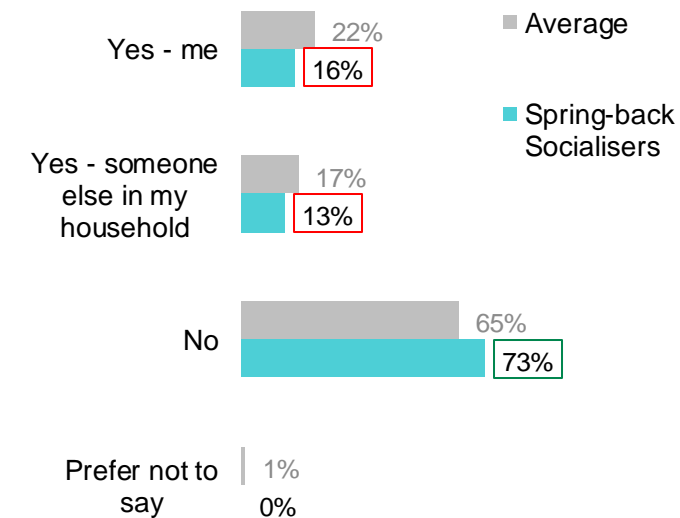
Av. = 31%

Region

■ Average ■ Spring-back Socialisers



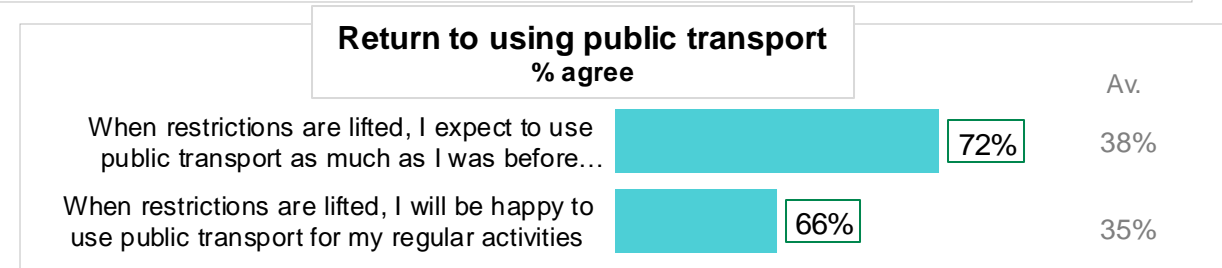
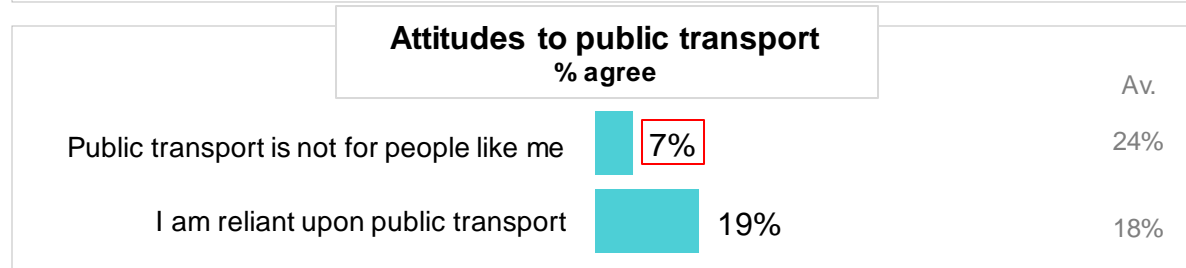
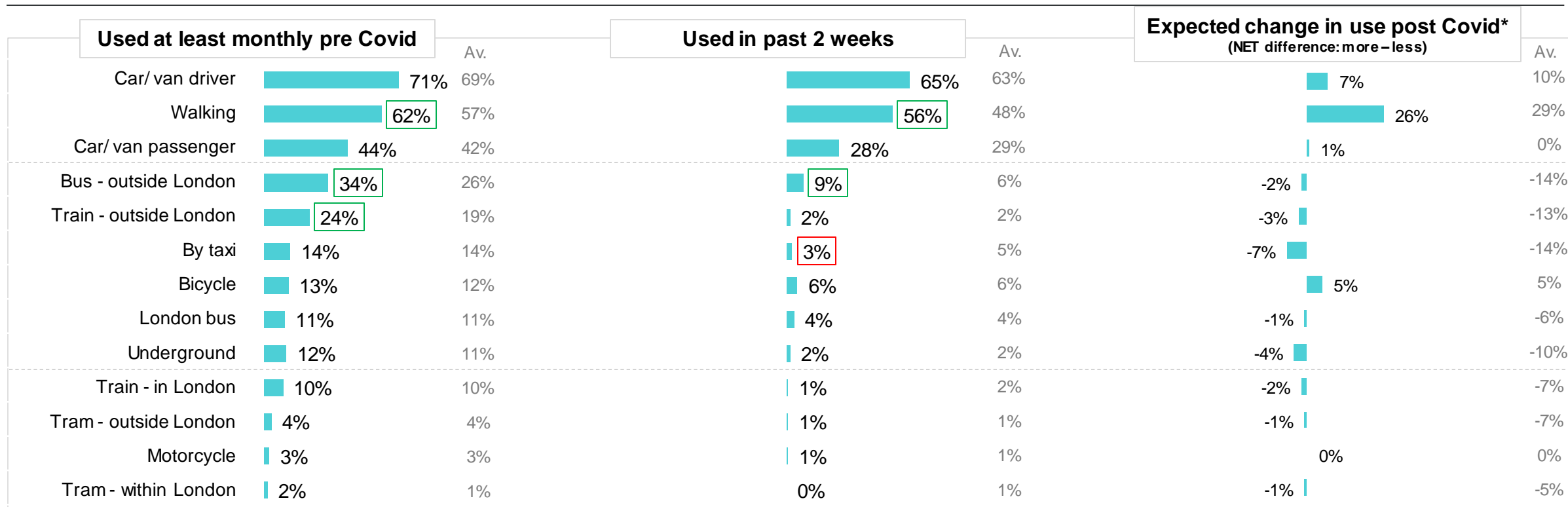
Someone in household is Covid vulnerable



22%

# Spring-back Socialisers will use public transport as much as they did before the pandemic and will be happy to use it to return to regular activities

Transport habits



\*This chart does not highlight significant differences

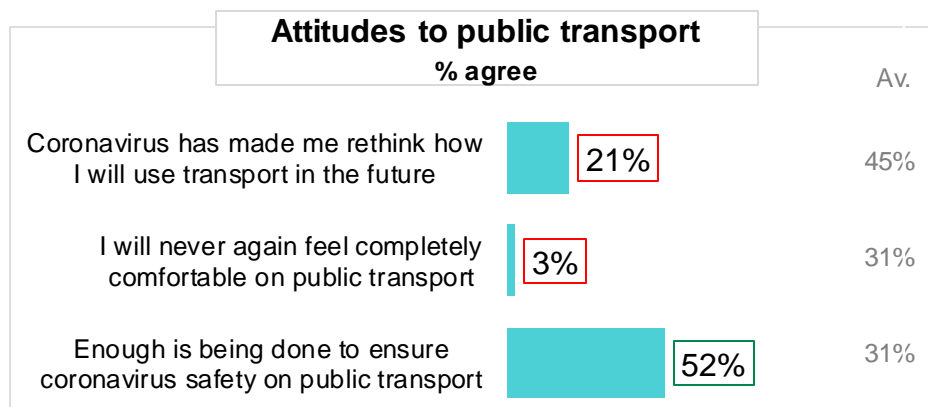
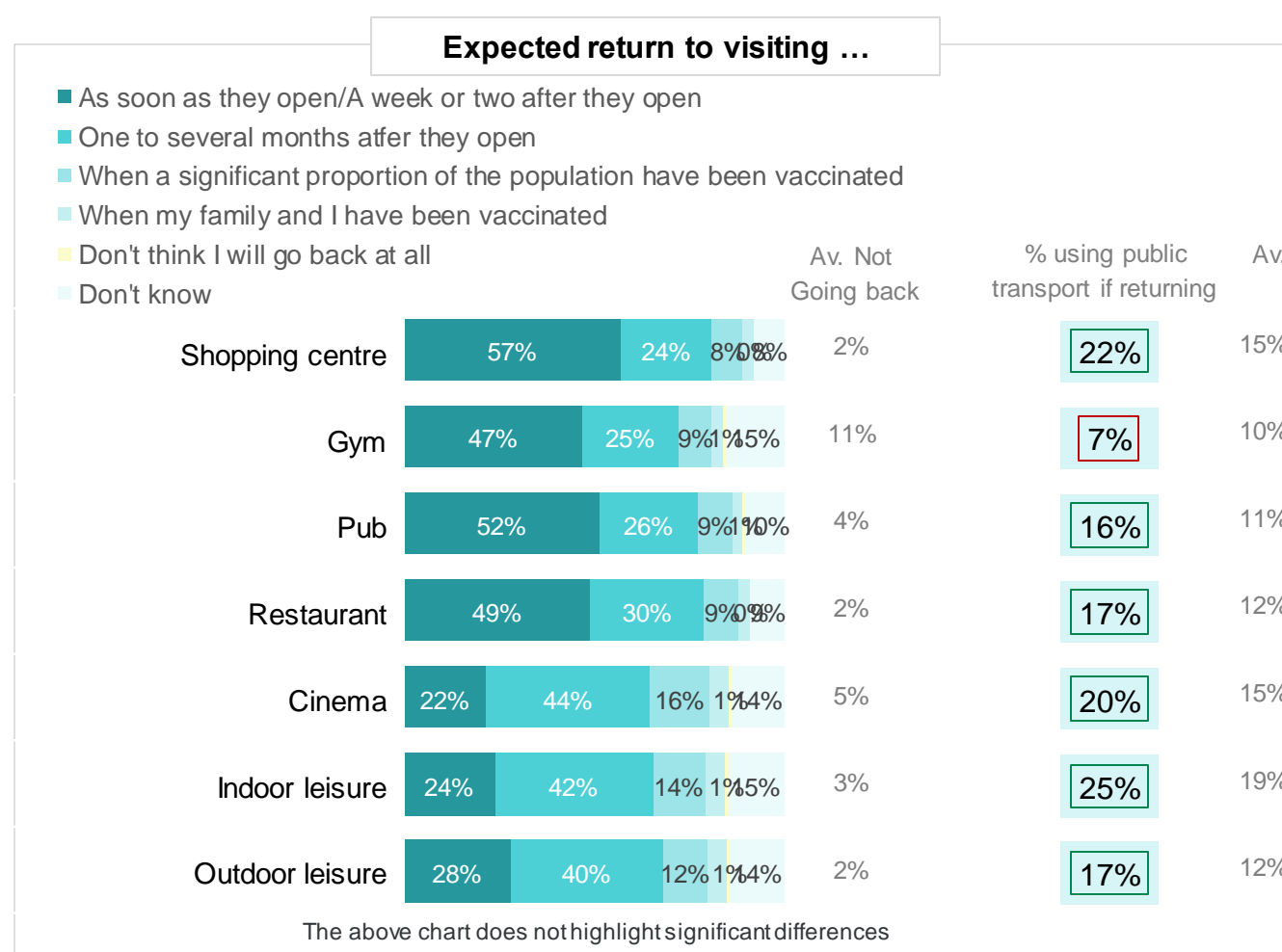
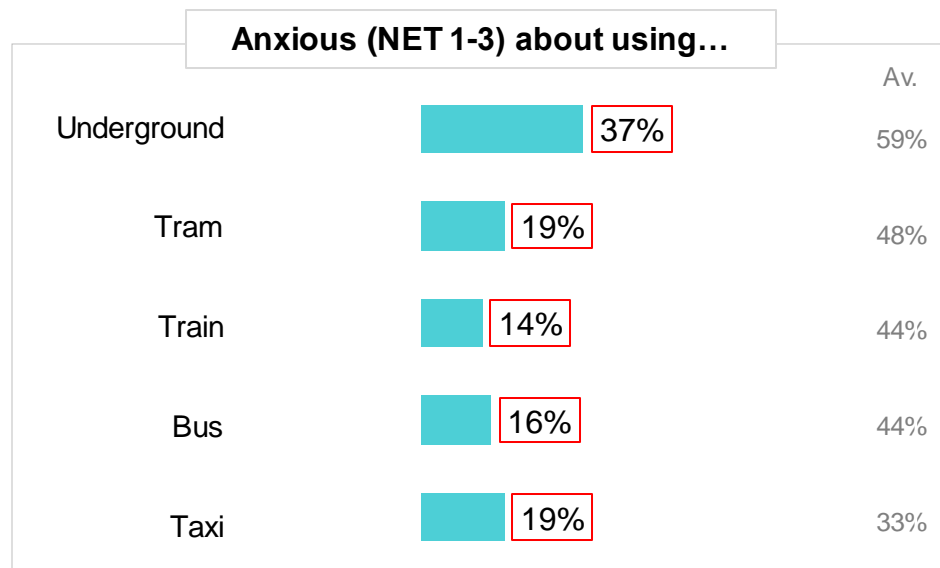
Q1. Past usage, Q2. Current usage, Q3. NEW8. Expected change in usage, Q4. Public transport attitudes. Base: All respondents/Use transport (4021/3979), Spring-back Socialisers (Segment 4) (916/916)

Green box: Significantly higher/lower than total at 95% confidence  
Red box: Significantly higher/lower than total at 95% confidence

22%

Concerns / Return

# They are less anxious about using public transport and believe enough is being done to ensure public transport is Covid safe



# Carefree and Carrying On



# Carefree and Carrying On

## All about me...

16%

Carefree and Carrying On are more likely to be **male** and **younger**. They are more likely to be **working full-time** and have **kids at home**. They are **less likely to have a longstanding physical/mental condition/disability or be vulnerable to Covid** and less likely to have been vaccinated

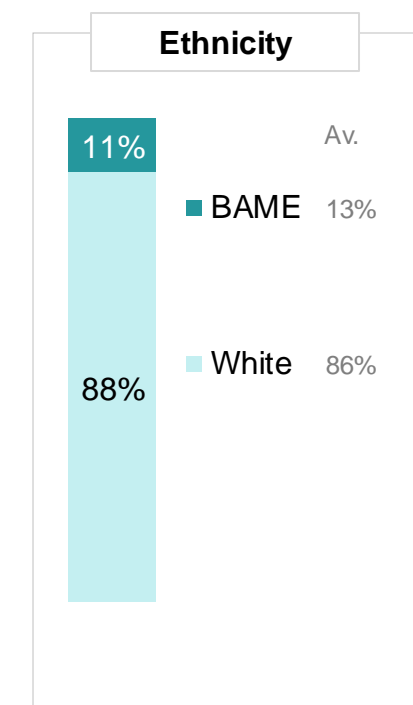
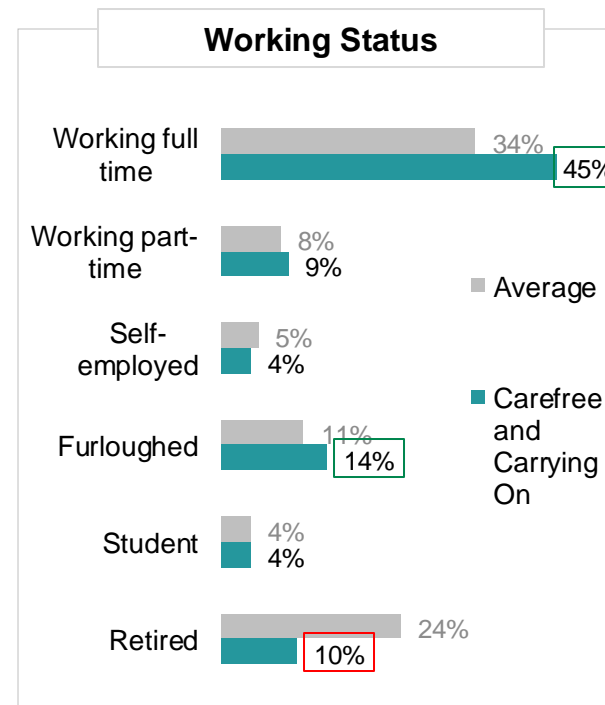
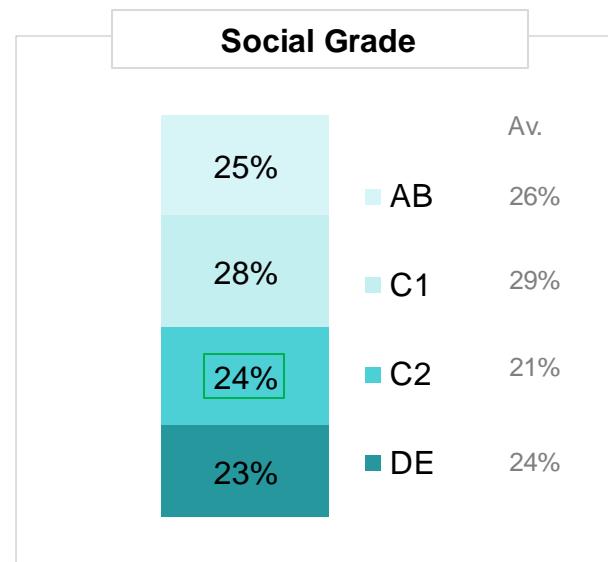
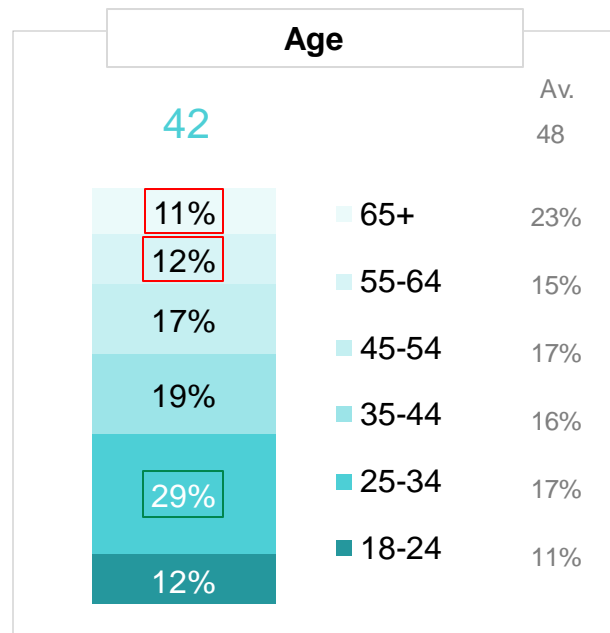
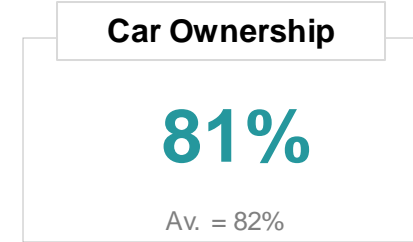
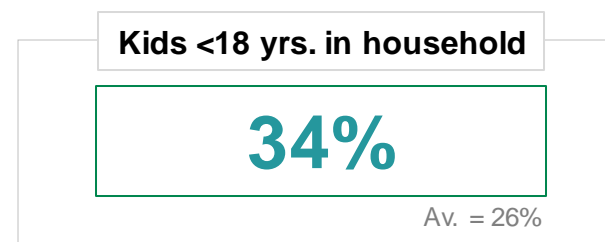
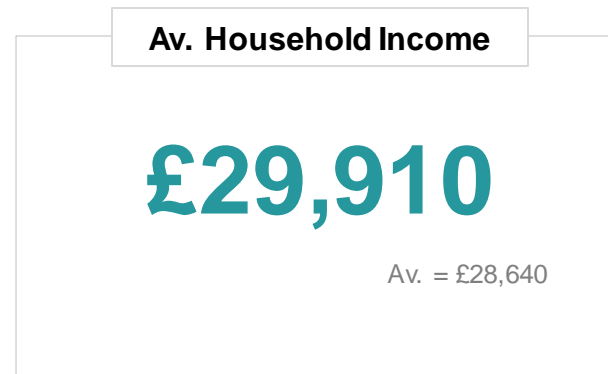
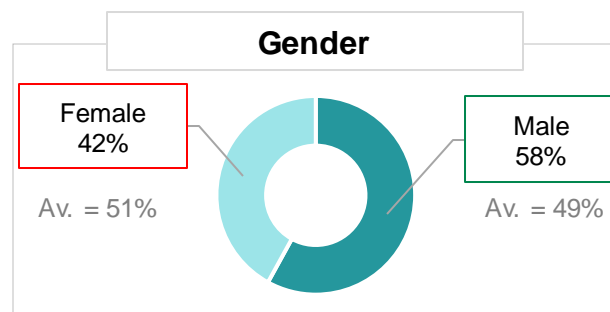
Carefree and Carrying On are **more likely to have used public transport in the past 2 weeks** and, like Spring-back Socialisers, are significantly **more likely to use public transport as much as pre-Covid** and be happy to use public transport for regular activities.

This group are the **least likely to feel anxious** about using public transport with only 11% feeling anxious to use trains. They **feel comfortable using public transport** and the virus has not made them rethink about future usage of transport. This segment are **likely to return to places soon after they open**.

16%

Demographics

# Carefree and Carrying On (16%) are more likely to be male, younger, working full-time, white and have kids at home



16%

Demographics

# They are less likely to have a disability or be vulnerable to Covid and less likely to have been vaccinated

Longstanding physical/mental condition/disability

16%

Av. = 23%

Urban vs Rural

Urban 85% 15% Rural

Av. = 82% 18%

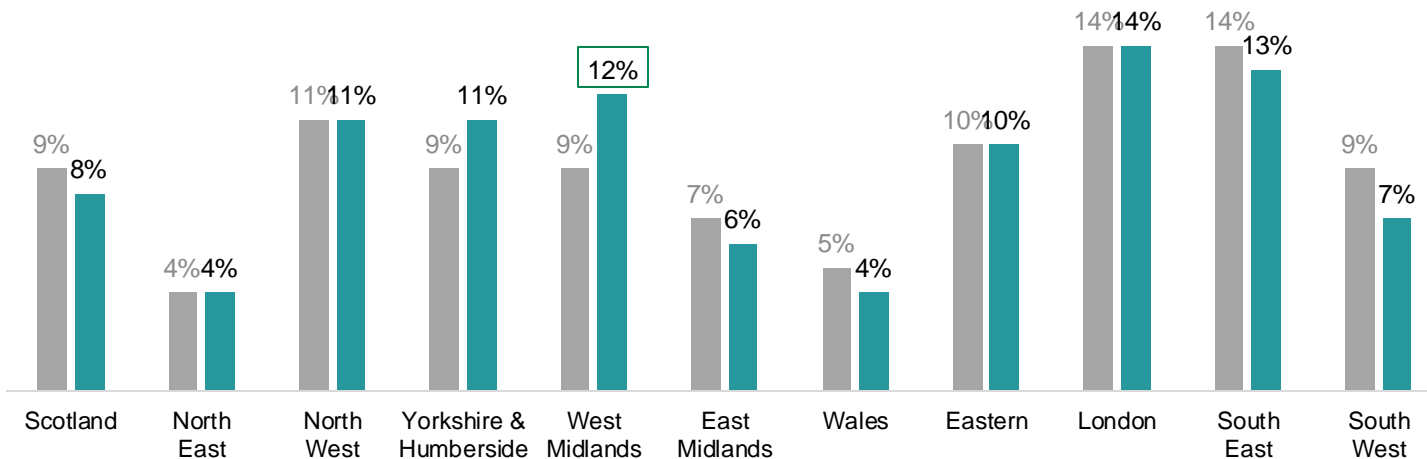
Personally vaccinated

19%

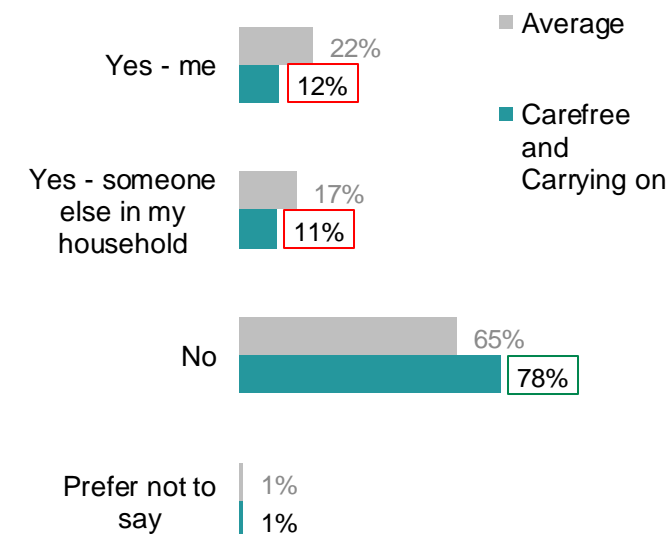
Av. = 31%

Region

Average Carefree and Carrying on



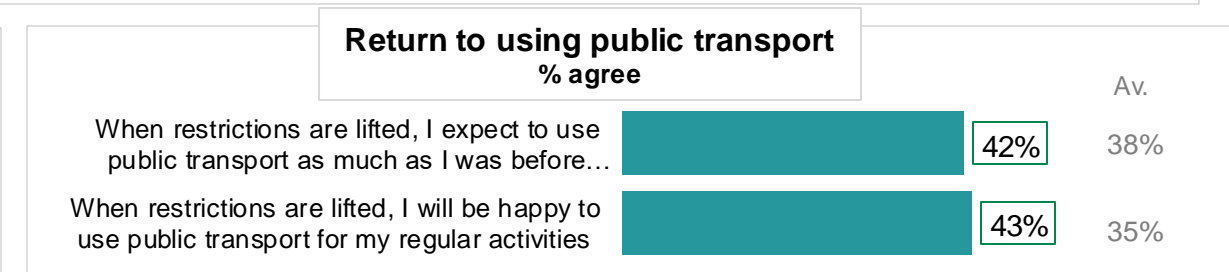
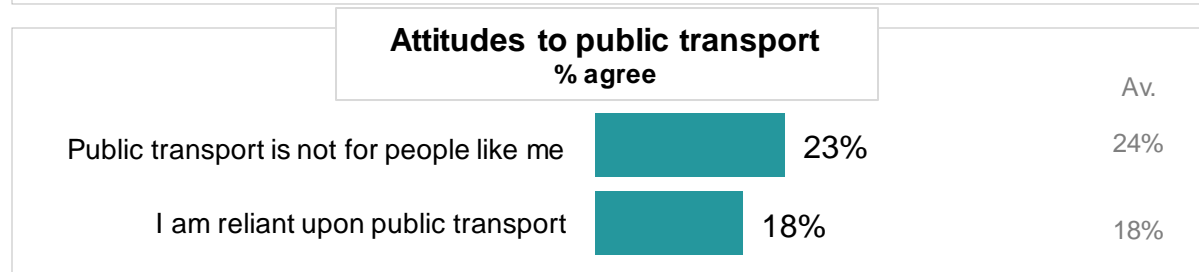
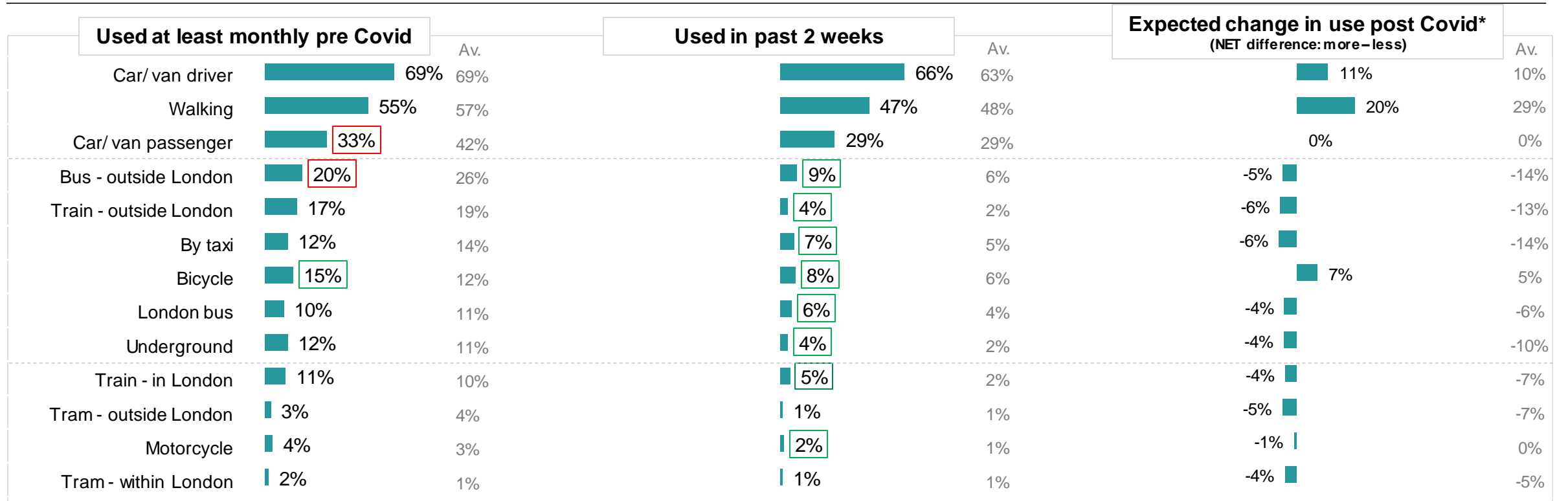
Someone in household is Covid vulnerable



16%

Transport habits

# This segment are more likely to have been using public transport recently and will be happy to use public transport at similar levels to pre-Covid once restrictions are lifted



\*This chart does not highlight significant differences  
Q1. Past usage, Q2. Current usage, Q.NEW8. Expected change in usage, Q.10 Public transport attitudes. Base: All respondents/Use transport (4021/3979), Carefree and Carrying On (Segment 1) (656/656)

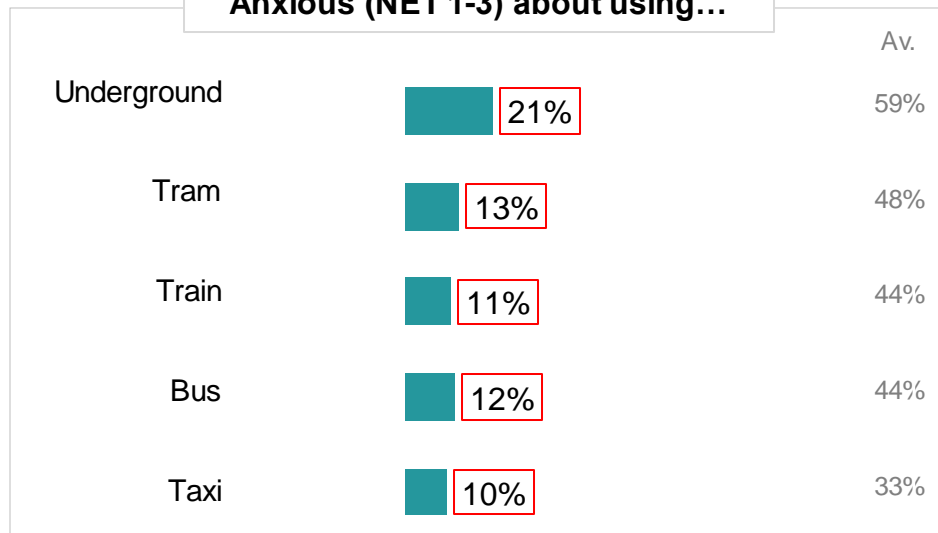
□ Significantly higher/lower than total at 95% confidence

16%

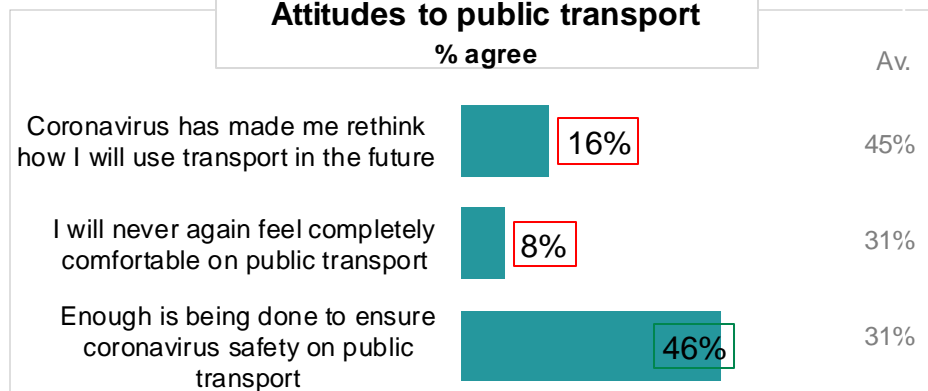
Concerns / Return

# They are the least anxious about using public transport and believe enough is being done to ensure public transport is Covid safe

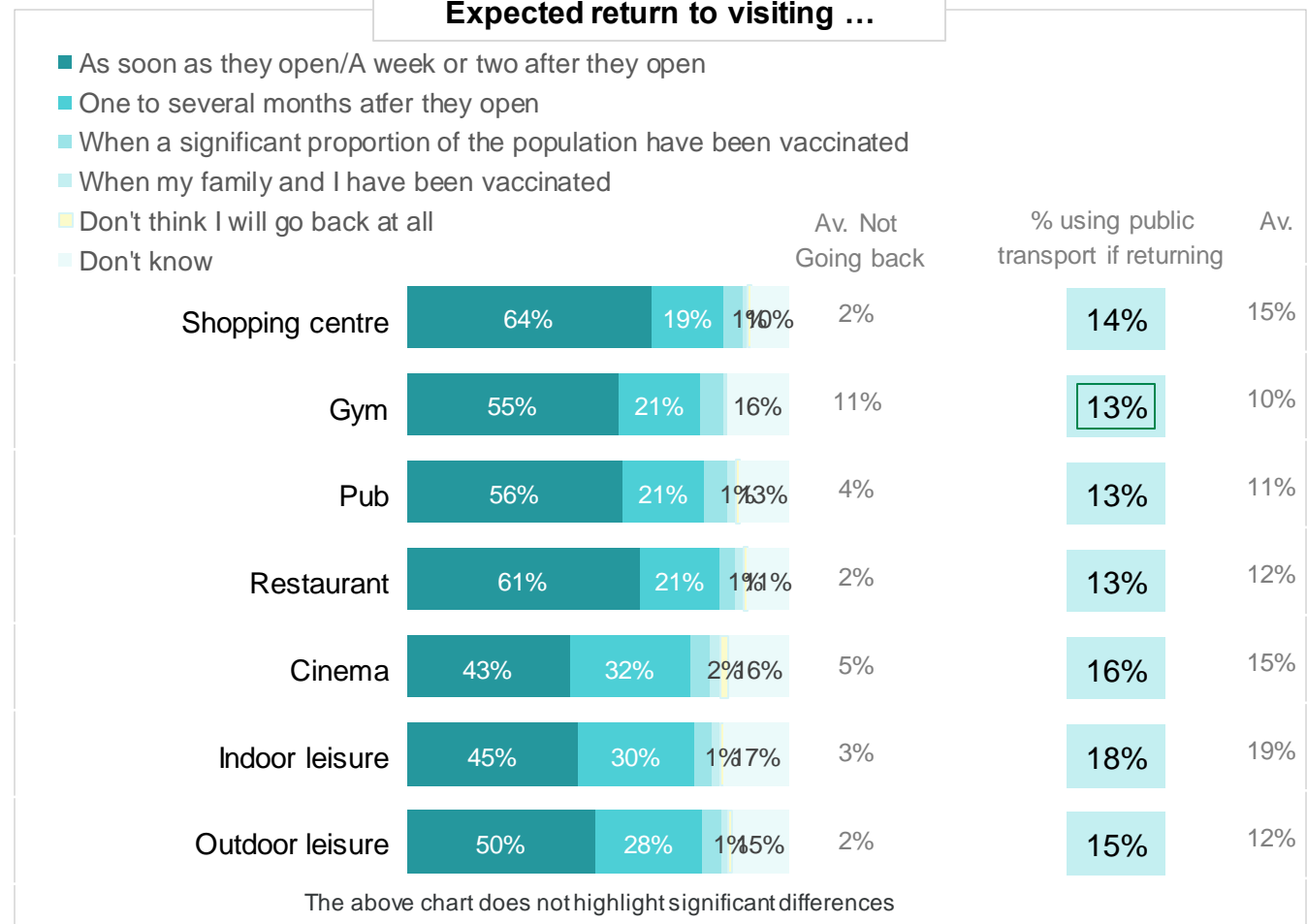
Anxious (NET 1-3) about using...



Attitudes to public transport  
% agree



Expected return to visiting ...

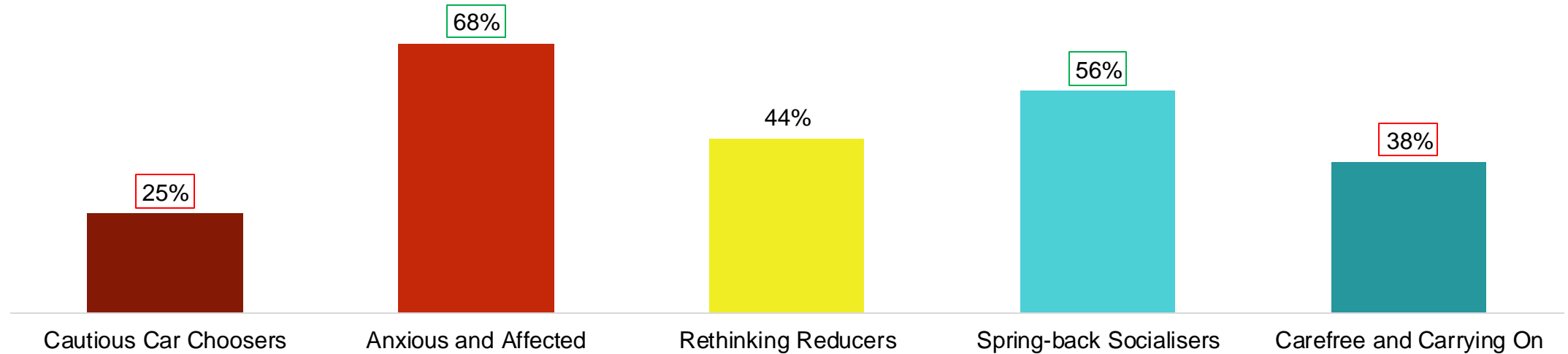


**Transport use: pre-Covid and current use**

# Anxious and Affected were most reliant on public transport before Covid while Cautious Car Users were least

Use Public Transport at least monthly pre-Covid

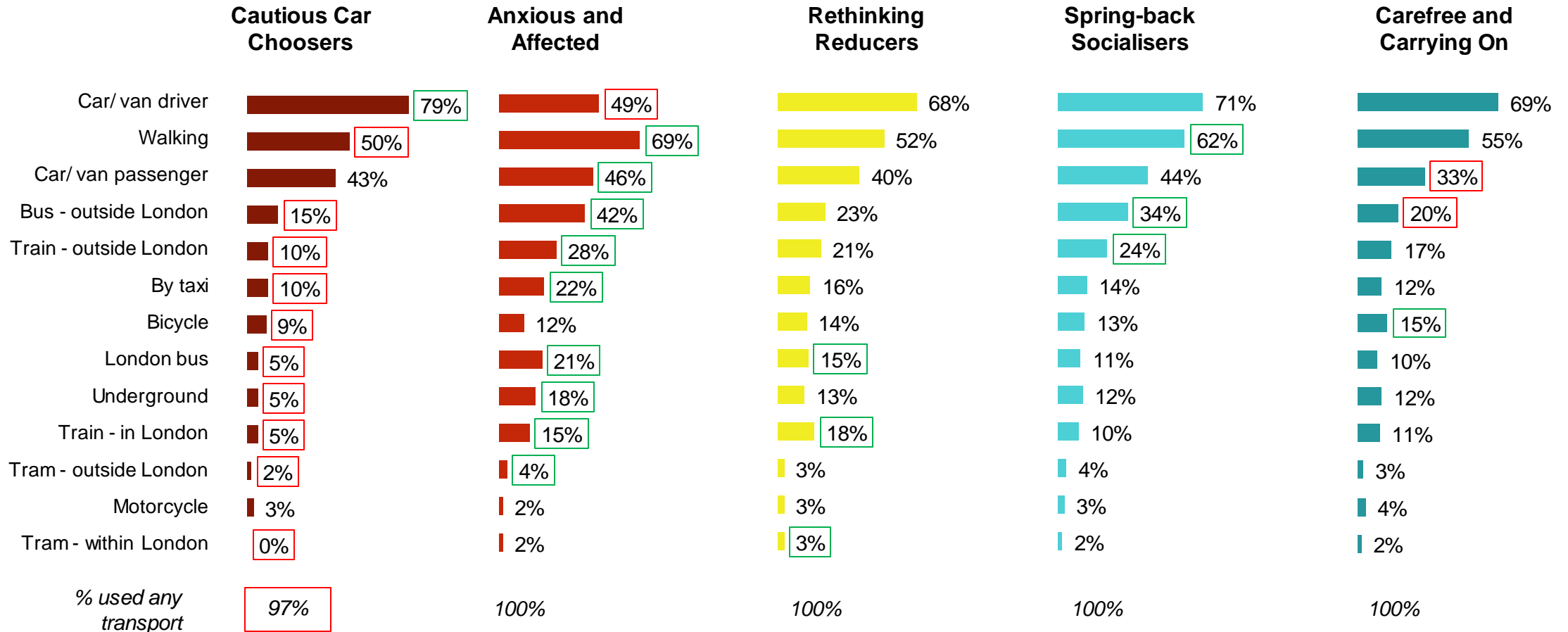
□ Significantly higher/lower than total at 95% confidence



# Anxious and Affected are least likely to have driven a car regularly pre-Covid

Modes used at least once per month pre-Covid

  Significantly higher/lower  
  than total at 95% confidence

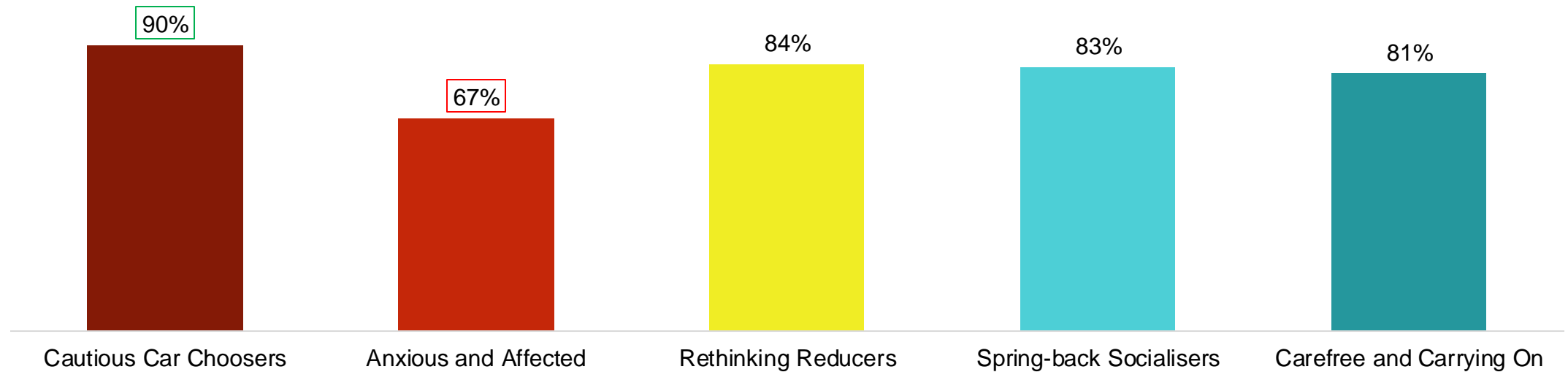




# And are least likely to own a car

Cars in household

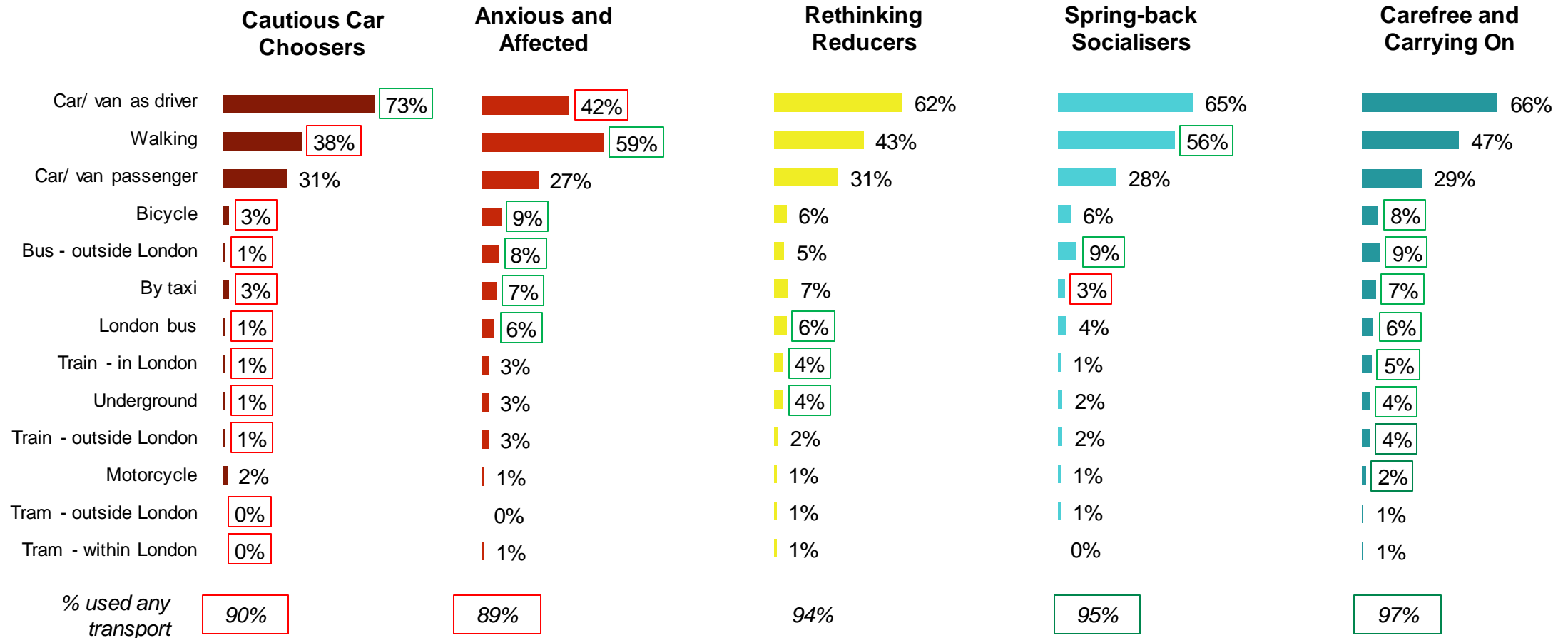
□ Significantly higher/lower  
□ than total at 95% confidence



# Carefree and Carrying On are most likely to have travelled in the past 2 weeks and to have travelled via most public transport modes

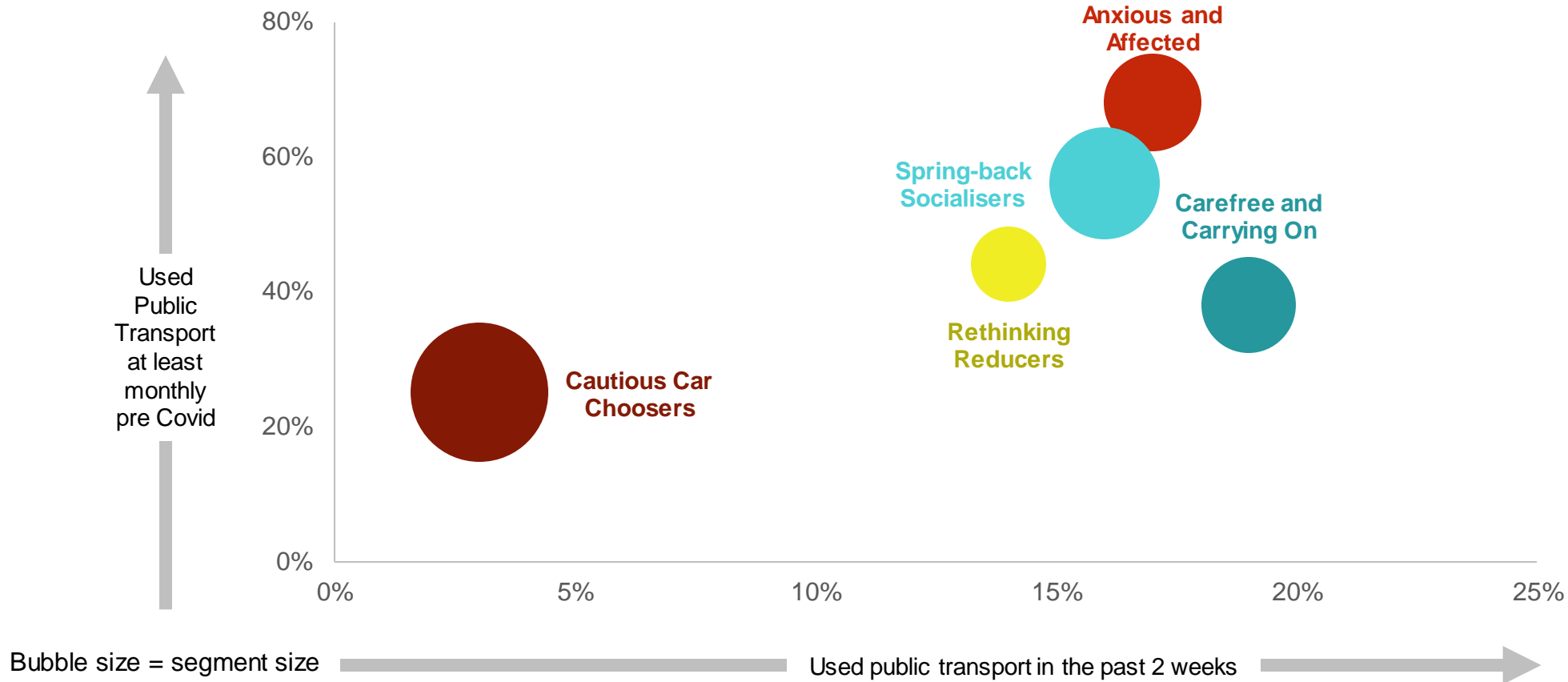
Modes used in the past 2 weeks

  Significantly higher/lower  
  than total at 95% confidence



# Despite their reluctance, Anxious and Affected are still one of the groups most using public transport currently

Use of public transport: pre-Covid versus in the past 2 weeks

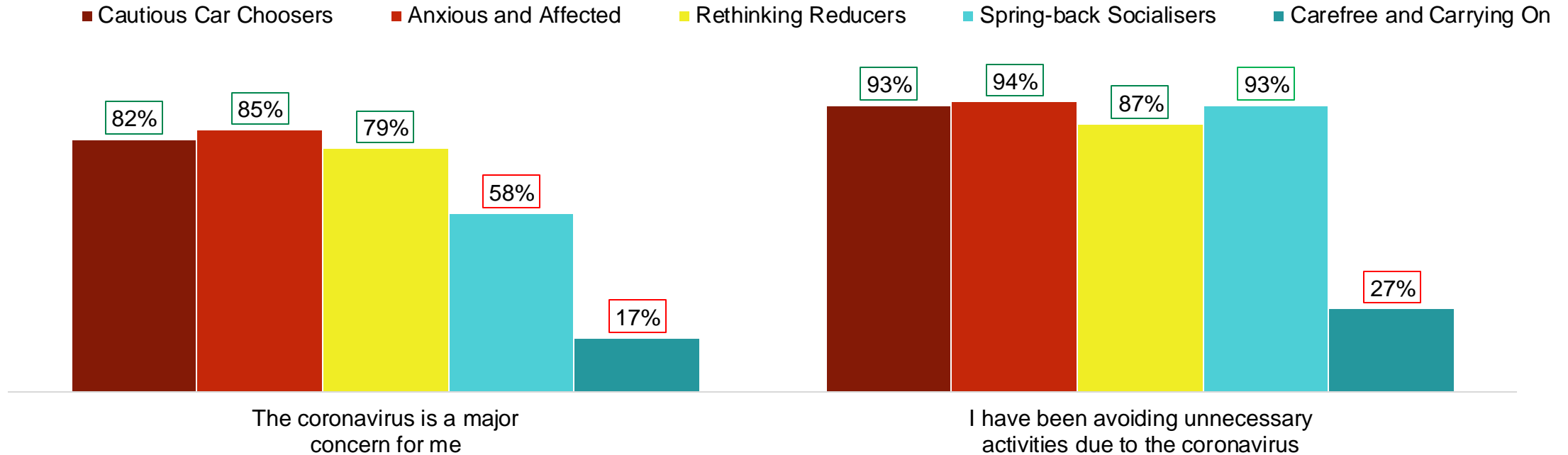


# **Attitudes and concerns towards using transport**

# The coronavirus has not been a major concern for Carefree and Carrying On, who are the only segment to have not been avoiding unnecessary activities over this time

Net Agreement: Covid concern statements

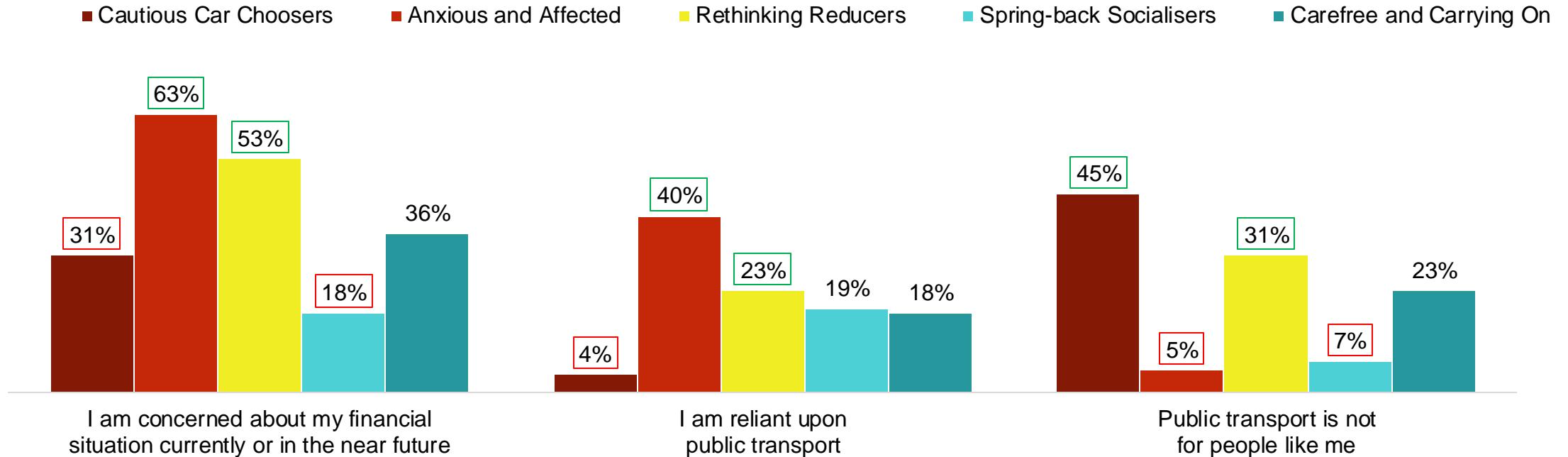
  Significantly higher/lower  
  than total at 95% confidence



# Anxious and Affected tend to be the most concerned about their financial situation and are most reliant on public transport

Net Agreement: Mindset statements

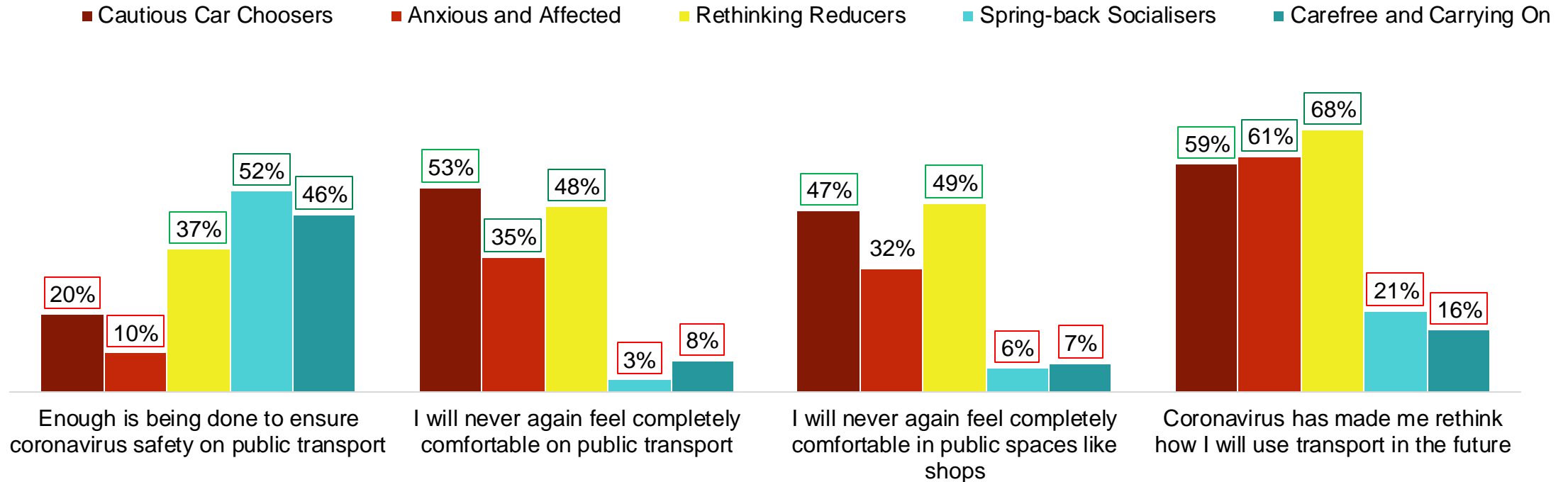
  Significantly higher/lower  
  than total at 95% confidence



# Anxious and Affected, Cautious Car Users and Rethinking Reducers are rethinking how they will use transport in the future. The former two don't believe enough is being done to ensure safety on trains

Net Agreement: Covid and Public Transport statements

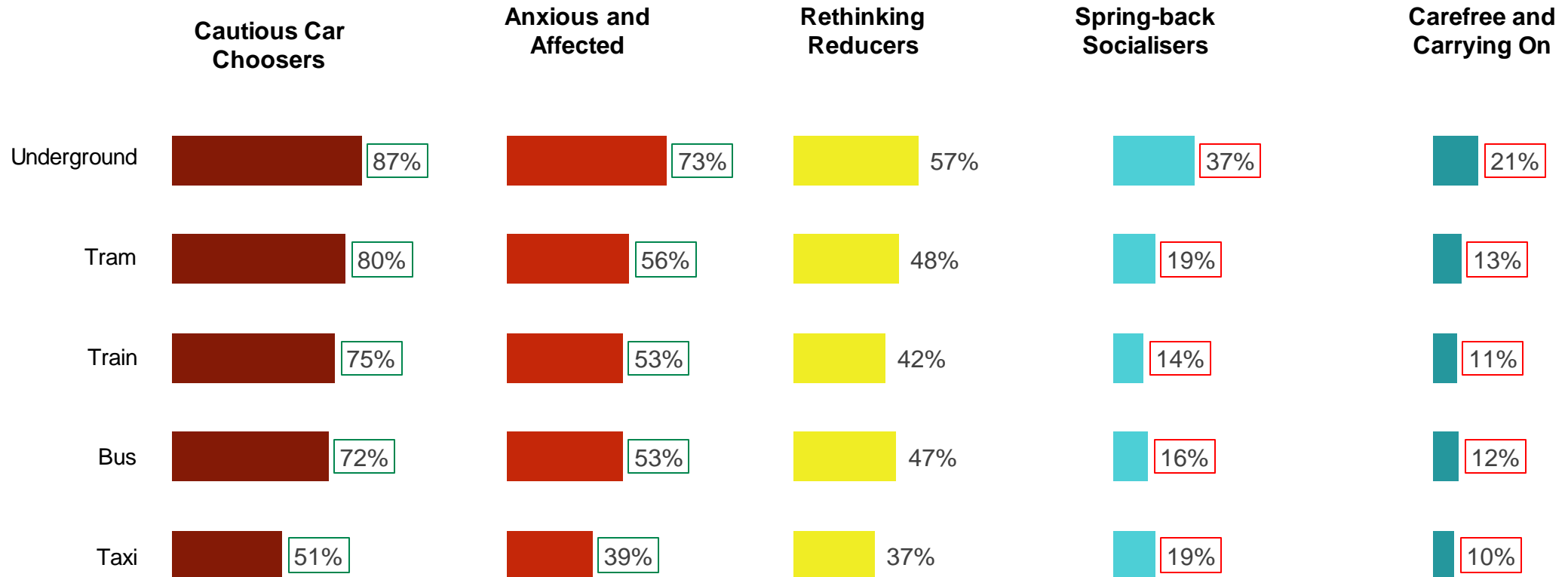
  Significantly higher/lower  
  than total at 95% confidence



# Cautious Car Choosers and Anxious and Affected are most anxious about using all types of transport

Anxious (NET 1-3) about using...

  Significantly higher/lower  
  than total at 95% confidence



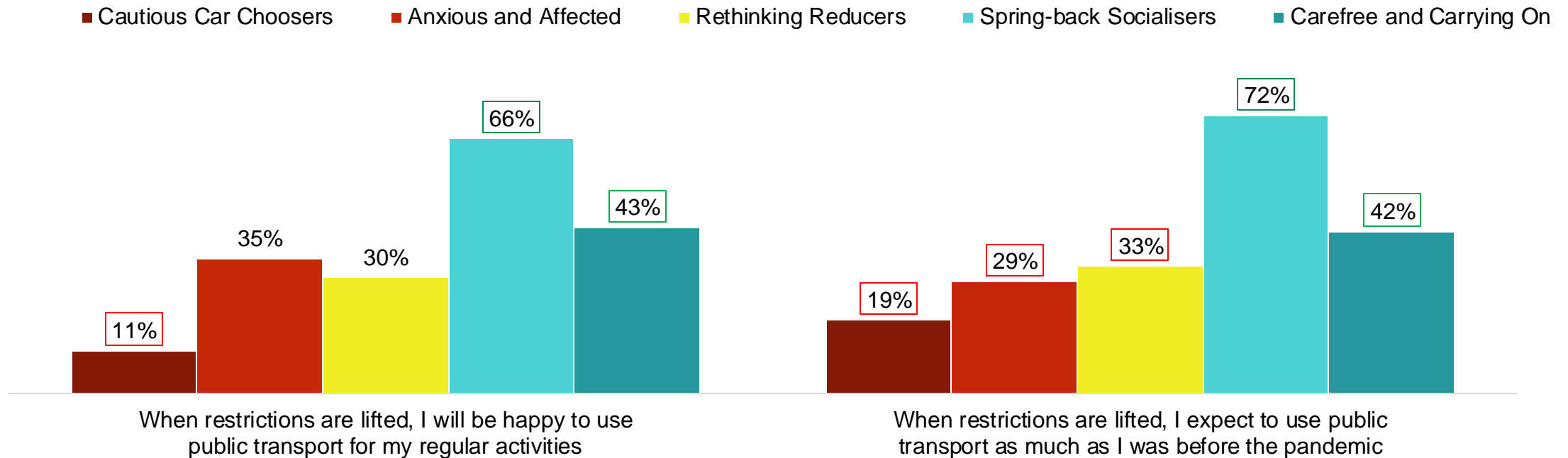


**Return to using public transport and wider activities**

# Spring-back Socialisers are most likely to return to using public transport as much as pre-Covid, while Cautious Car Choosers are least likely

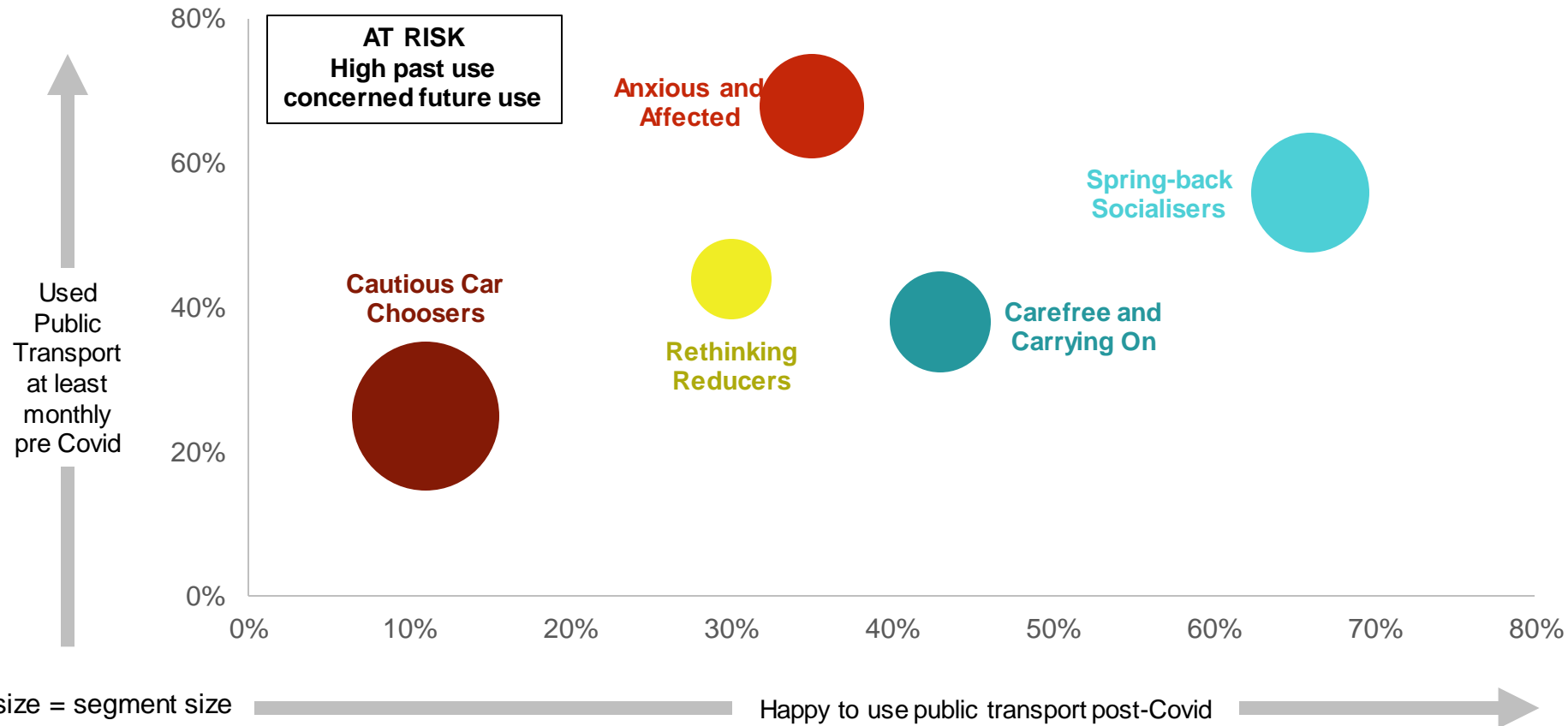
Net Agreement: Return to using public transport

  Significantly higher/lower  
  than total at 95% confidence



# Anxious and Affected along with Rethinking Reducers were higher users of public transport pre-Covid and are now more likely to be concerned about future use

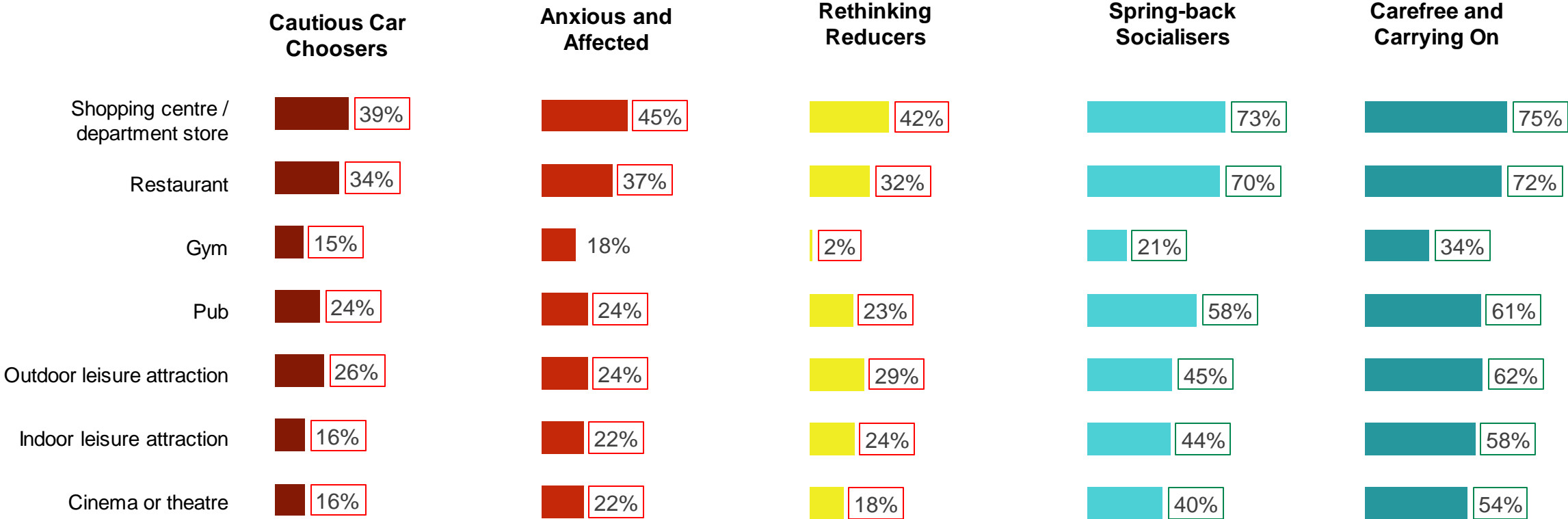
Segments plotted by intent to return vs monthly usage of Public Transport pre-Covid



# Carefree and Carrying On and Spring-back Socialisers are the two groups who are most likely to return to places once open

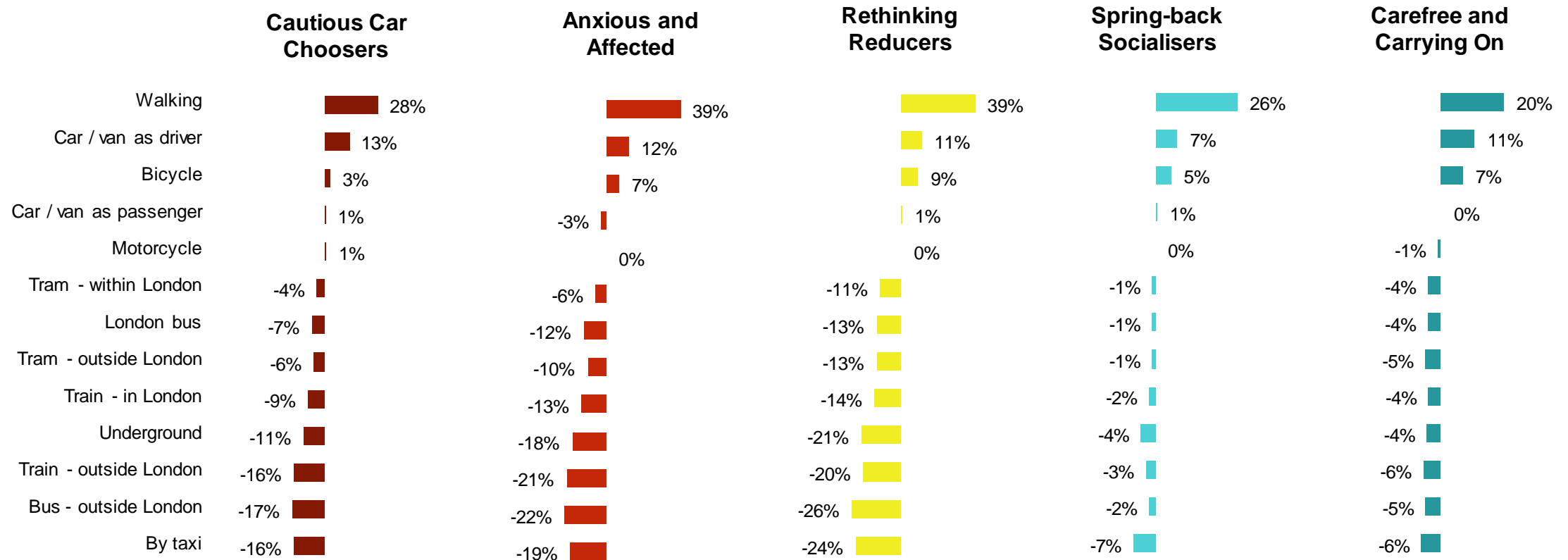
How soon will return to following places: % stating as soon as they open to within a month or two

  Significantly higher/lower  
  than total at 95% confidence



# Anxious and Affected and Rethinking Reducers are more likely to have a NET reduction in travel across modes of public transport

Expected change in mode use when restrictions ends: NET difference (Use more – Use less)\*



\*This chart does not highlight significant differences

Q.NEW8 When restrictions end and coronavirus no longer poses a significant risk, how do you expect your use of the following types of transport might change compared to 'normal life' before the pandemic started in March last year?

Base: All who have used transport (3979) CCO (656) CCC (1296) AA (725) SBS (916) RR (386)

# Rethinking Reducers are significantly more likely to be working from home when restrictions are lifted

When restrictions are lifted, for my job I will...

  Significantly higher/lower  
  than total at 95% confidence

