

# Covid-19 travel segmentation

19 March - 25 April analysis

May 2021



# Meet our segments



**Rethinking Reducers**



**Carefree and Carrying on**



**Cautious Car Choosers**



**Anxious and Affected**



**Spring-back Socialisers**

# Public transport – an attitudinal divide?

For almost a year Transport Focus has been using its [Travel During Covid-19 survey](#) to understand people's views and concerns about travel. Since March we have also been digging deeper into the survey using new segmentation analysis, breaking the population down into five groups according to key behaviours and attitudes (see page 18 for more on each segment). The segmentation helps illustrate a divide in how people feel about public transport and Covid-19 as we emerge from restrictions.

The segments are not fixed, so we expect the size of each to ebb and flow over time as people respond to events and changes. The 'Carefree and Carrying on' segment has grown since 'lockdown' restrictions began to ease, suggesting more people have been relaxing and starting to 'go back to normal'. Overall there's a finely balanced split. Around half fall into either the 'Carefree and Carrying on' or 'Spring-back Socialiser' groups and are feeling more confident about using public transport. But a half remain in one of the remaining groups and are more nervous about coronavirus and returning to travel.

Most concerned are the 'Cautious Car Choosers', but they were unlikely to use public transport before the pandemic, so their views may not be considered an immediate priority. In the short-term it makes sense for operators to focus on the 'Rethinking Reducers' and 'Anxious and Affected' segments. Instilling confidence among these passengers will be vital to rebuild passenger numbers in the coming months.

The 'Anxious and Affected' are more likely than all the other segments to have been avoiding public transport, or to feel that it is not safe. At the same time, they're also more likely than others to have used public transport in the last seven days – a result of being more likely to be reliant on public transport. That less than one in five in this group think enough is being done to ensure coronavirus safety shows not every passenger is also a vote of confidence. A significant minority simply have to travel.

# Public transport – an attitudinal divide?

‘Spring-back Socialisers’ are now less likely to say they are avoiding public transport than in March. These people have generally been following the lockdown rules carefully, but are keen to get back to doing the things they’ve been missing. A clear majority of the ‘Spring-back Socialisers’ and ‘Carefree and Carrying on’ say they’d feel safe making a journey by train or bus, but less than half in the other three groups say the same. They just need something to do.

This split frames one of the key current challenges for public transport as lockdown restrictions ease; managing capacity that’s limited by social distancing. While it’s welcome news some people are feeling more confident and are keen to get back out there, many still have strong concerns. We know public transport has been getting busier again. As this trend continues we should be aware the pressure on space to social distance on board is likely to make some passengers feel less safe.

With a review of social distancing planned we’ve recently started tracking attitudes again. Overall six in 10 agree they won’t use public transport unless social distancing is in place, but again the differences between some of the segments are stark. Just one in four of the ‘Carefree and carrying on’ feel this way, compared to eight in 10 ‘Cautious Car Choosers’. Perhaps more pressing in the immediate term for the transport industry is that almost six in 10 ‘Spring-back socialisers’ say they won’t use public transport unless social distancing is in place. They may be keen to get back to the activities they enjoy, but even amongst this more confident group it’s clear there’s no appetite to go all the way back to normal just yet.

We’ll keep tracking these changes in the coming weeks and will explore in more detail what operators can do to help each of the segments more confident to choose public transport in the future.

# Key findings

- As 'lockdown' has begun to ease the proportion in the 'Carefree and Carrying On' segment has begun to grow slowly while the 'Anxious and Affected' segment has reduced in size. Other segments are more consistent in size.
- The 'Anxious and Affected' segment are more likely than others to have made a journey using public transport in the last seven days. This group are typically the most reliant on public transport.
- Those in the 'Carefree and Carrying On' segment are more likely than others to have made journeys to work, and also for leisure reasons in the last seven days. The proportion of leisure journeys being made has increased across all segments.
- Among those not using public transport, those in the 'Anxious and Affected' segment are more likely than others to have been avoiding public transport, or to feel that it is not safe to use public transport at the moment.
- Among those who have not used a train or a bus in the last seven days, those in the 'Carefree and Carrying On' segment are more likely than others to say that they would feel safe to do so.

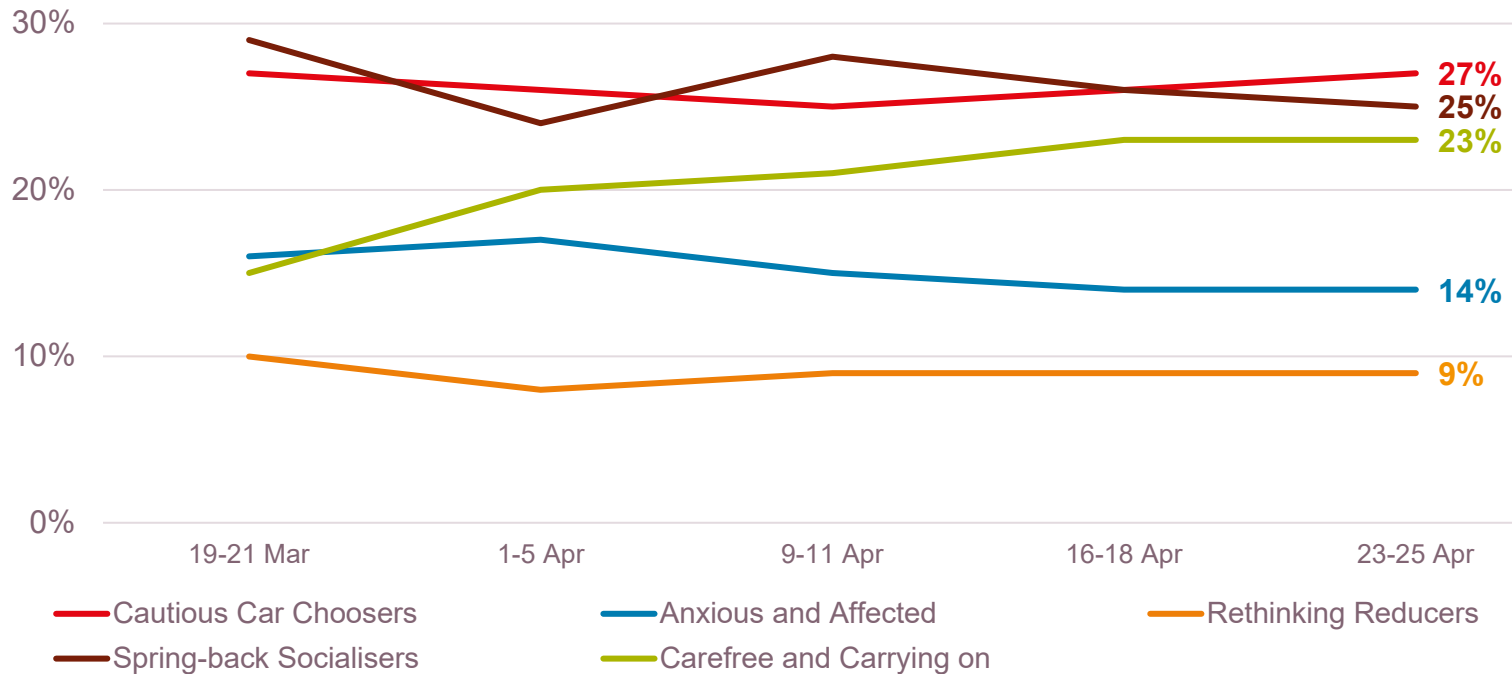
# Key findings (2)

- Among those who have an opinion or feel the question is applicable, those in the 'Cautious Car Choosers' segment are more likely than others to require social distancing to be enforced on public transport in order to encourage them to use it. Those in the 'Carefree and Carrying On' segment are more relaxed than others about social distancing on public transport.
- Among those who have an opinion or feel that the question is applicable, those in the 'Cautious Car Choosers' segment are more likely than others to agree that they will never again feel completely comfortable on public transport. Those in the 'Anxious and Affected' segment are least likely to agree that enough is being done to ensure coronavirus safety on public transport.
- Those in the 'Anxious and Affected' segment are also more likely than others to agree that coronavirus is a major concern for them.

# The size of the segments may change over time

The segment is assigned to each survey respondent on the basis of their answers to several questions which remain in the questionnaire. As people change their views, or adapt these in relation to changing circumstances, the size of the segments may change. The chart below indicates this change.

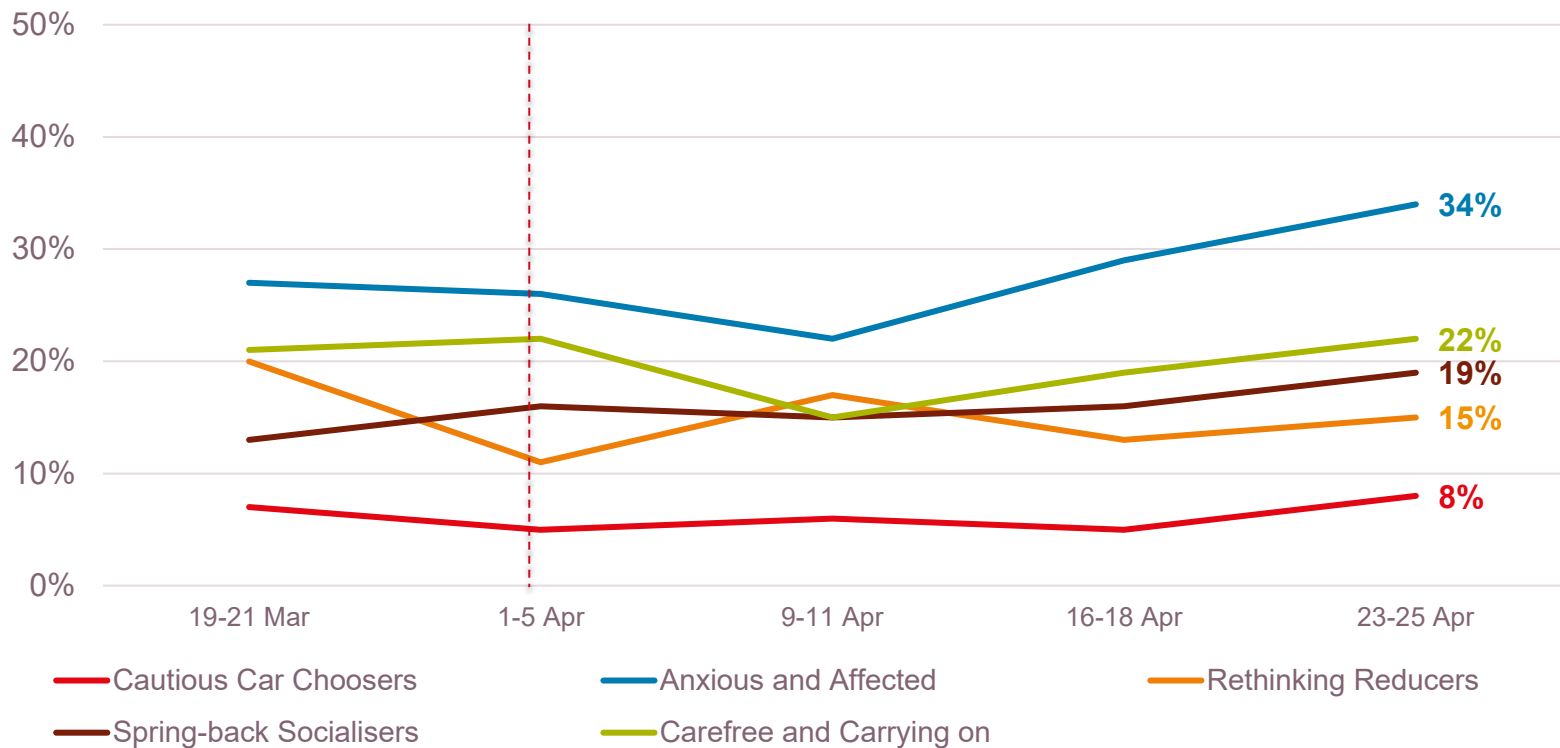
## Segment size\*



\*The size of the segments does not sum to 100% as a proportion of the sample remains unclassified in this way

# The Anxious and Affected segment are more likely than others to have used public transport in the last seven days

## Use of public transport in the last seven days

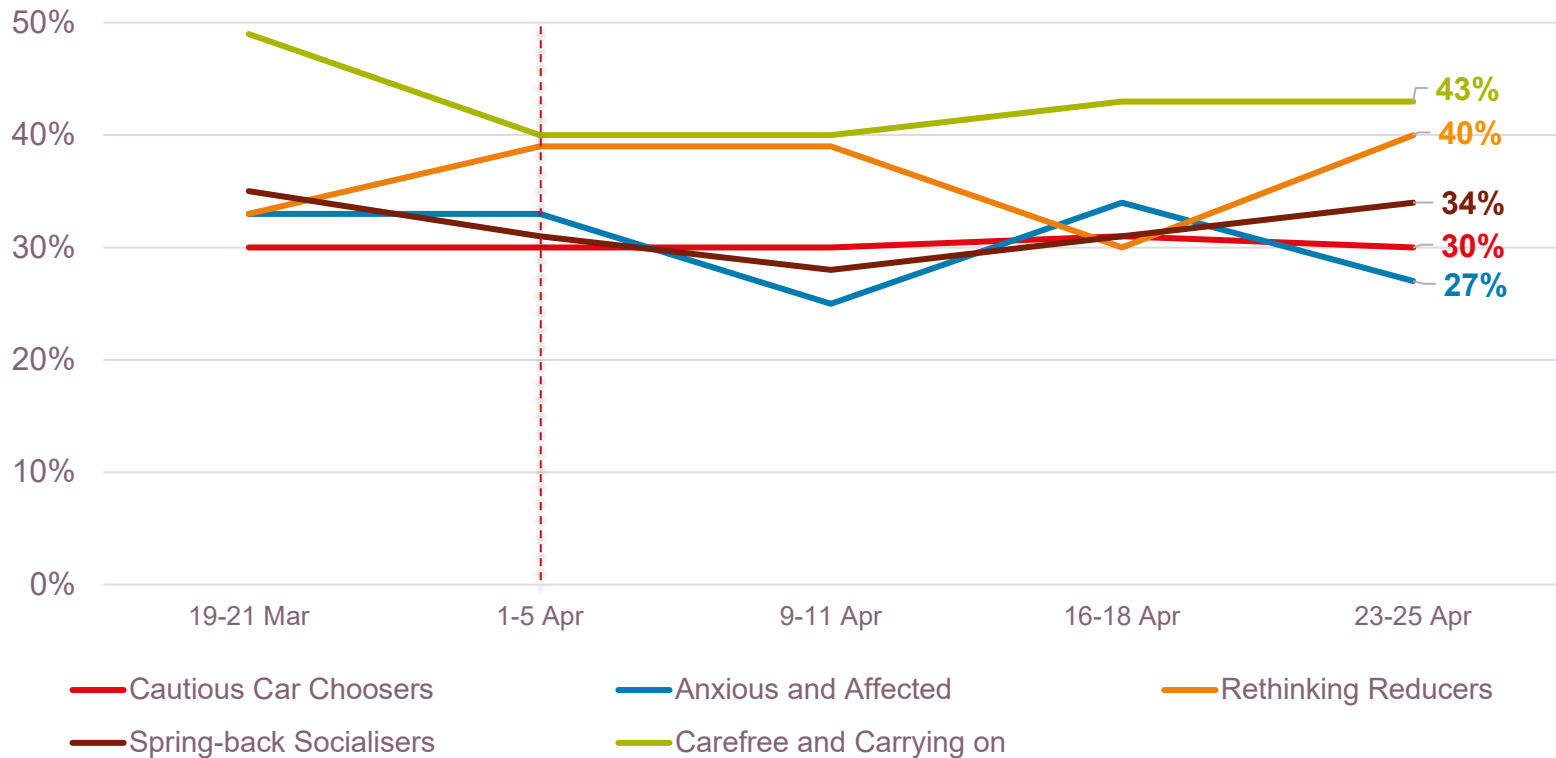


----- Changed from 'last two weeks' to 'last seven days' at week 40 (1-5 April)



# The Carefree and Carrying on segment continue to be more likely than others to be making journeys to or from work in the last seven days

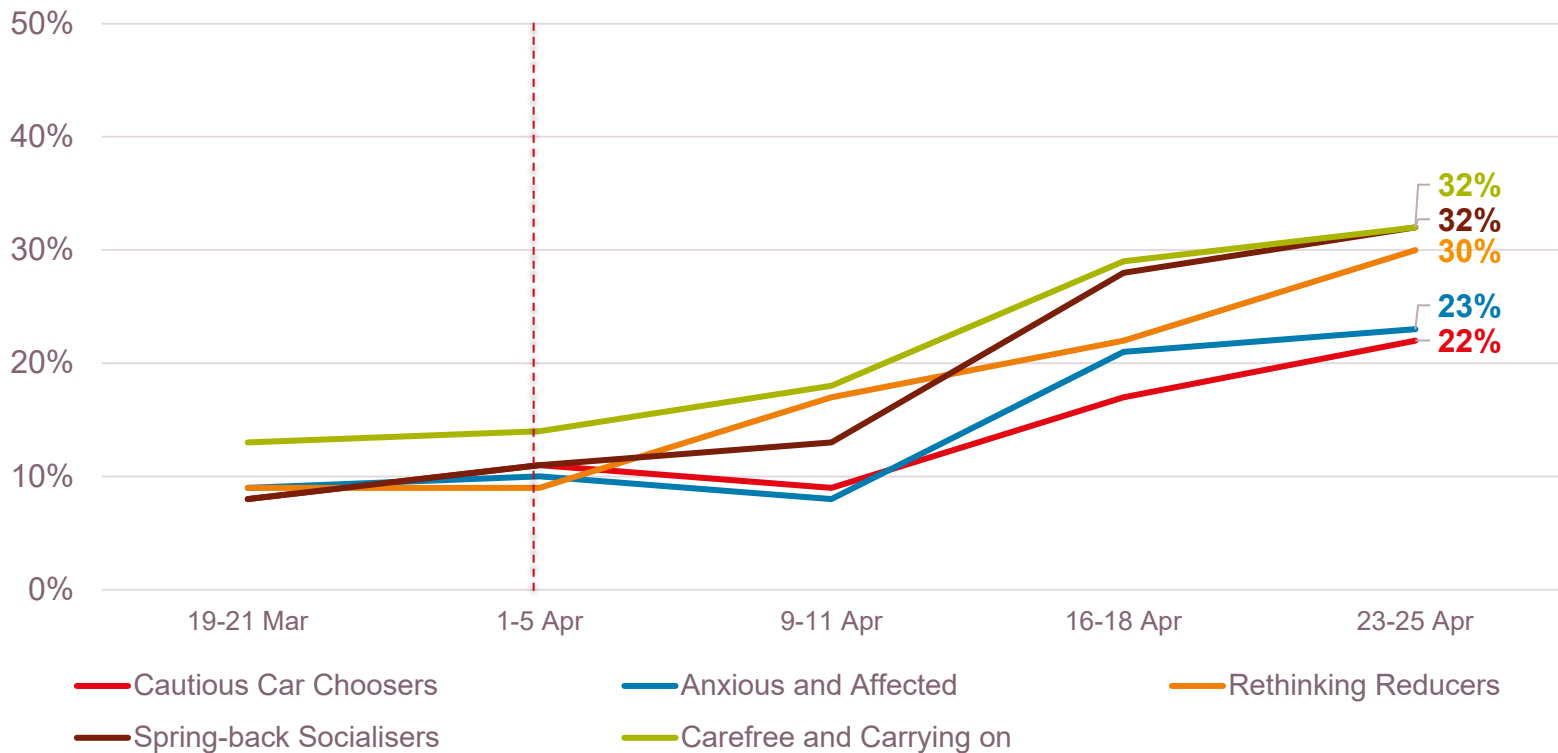
Journeys made to or from work (by any mode of transport)



----- Changed from 'last two weeks' to 'last seven days' at week 40 (1-5 April)

## The Carefree and Carrying on segment are also more likely than others to be making journeys for leisure reasons

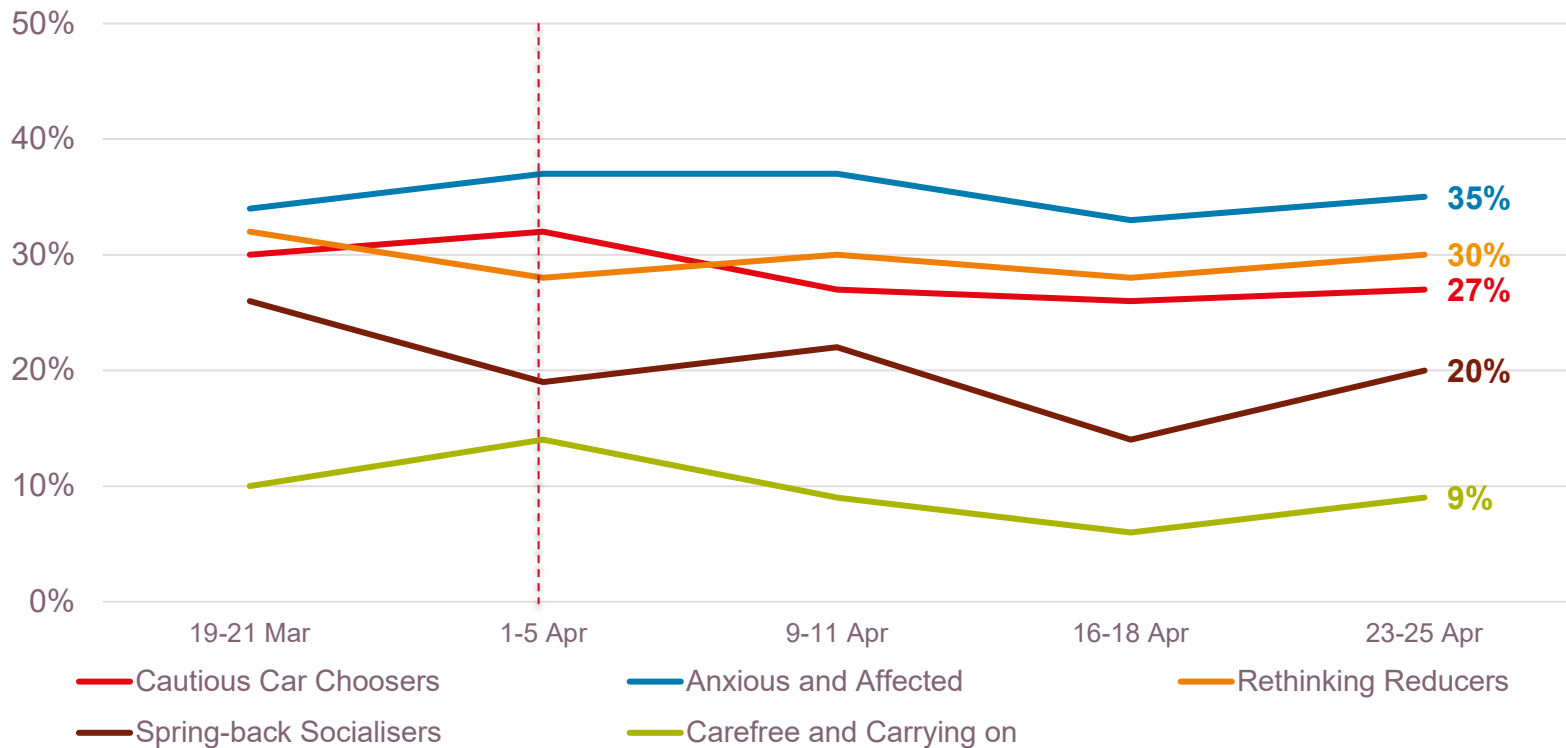
Journeys made for other leisure reasons (by any mode of transport)



----- Changed from 'last two weeks' to 'last seven days' at week 40 (1-5 April)

## Among those not using public transport, those in the Anxious and Affected segment are more likely than others to be avoiding doing so

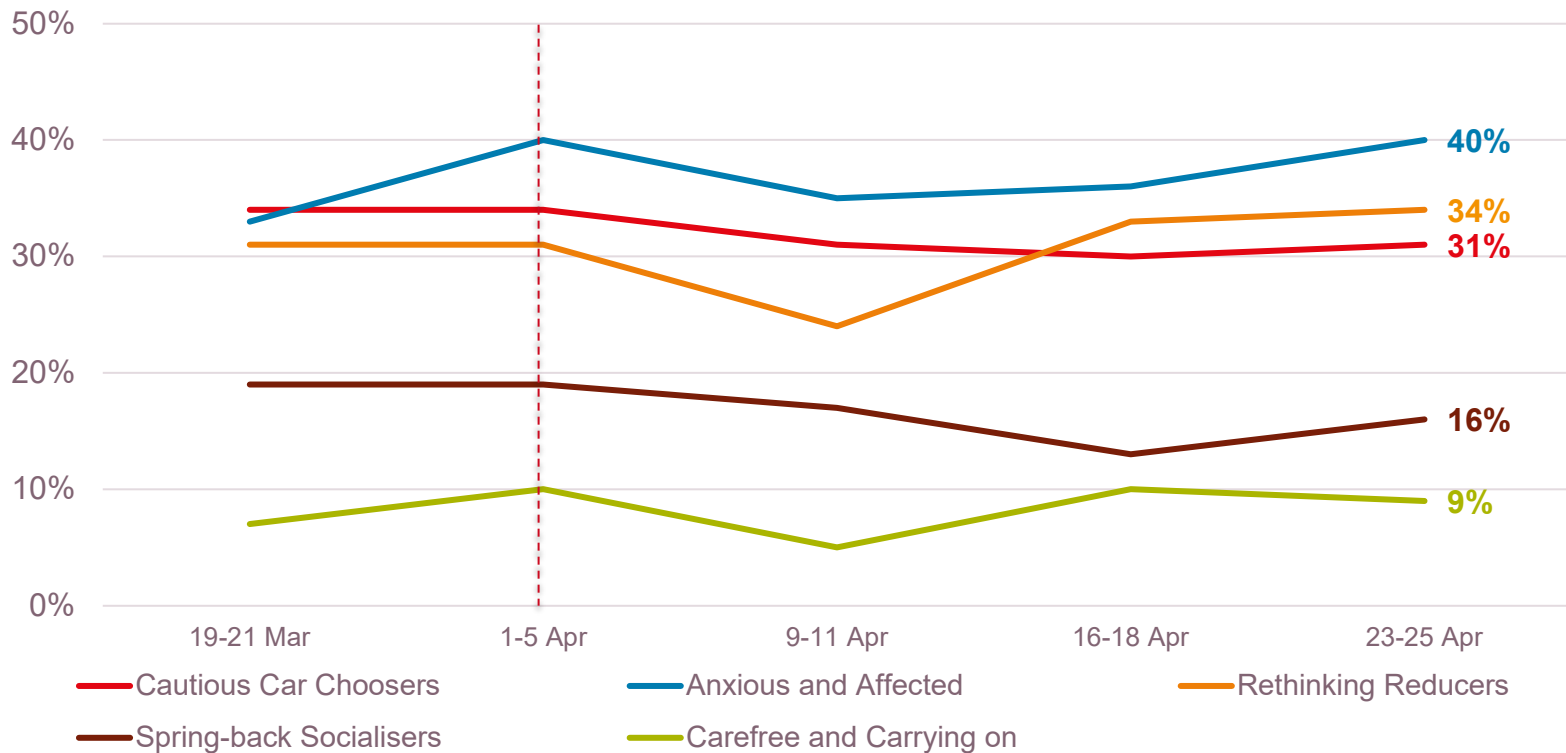
### Proportions avoiding using public transport



----- Changed from 'last two weeks' to 'last seven days' at week 40 (1-5 April)

# Those in the Anxious and Affected segment are also more likely than others not to be using public transport because they do not feel it is safe to do so

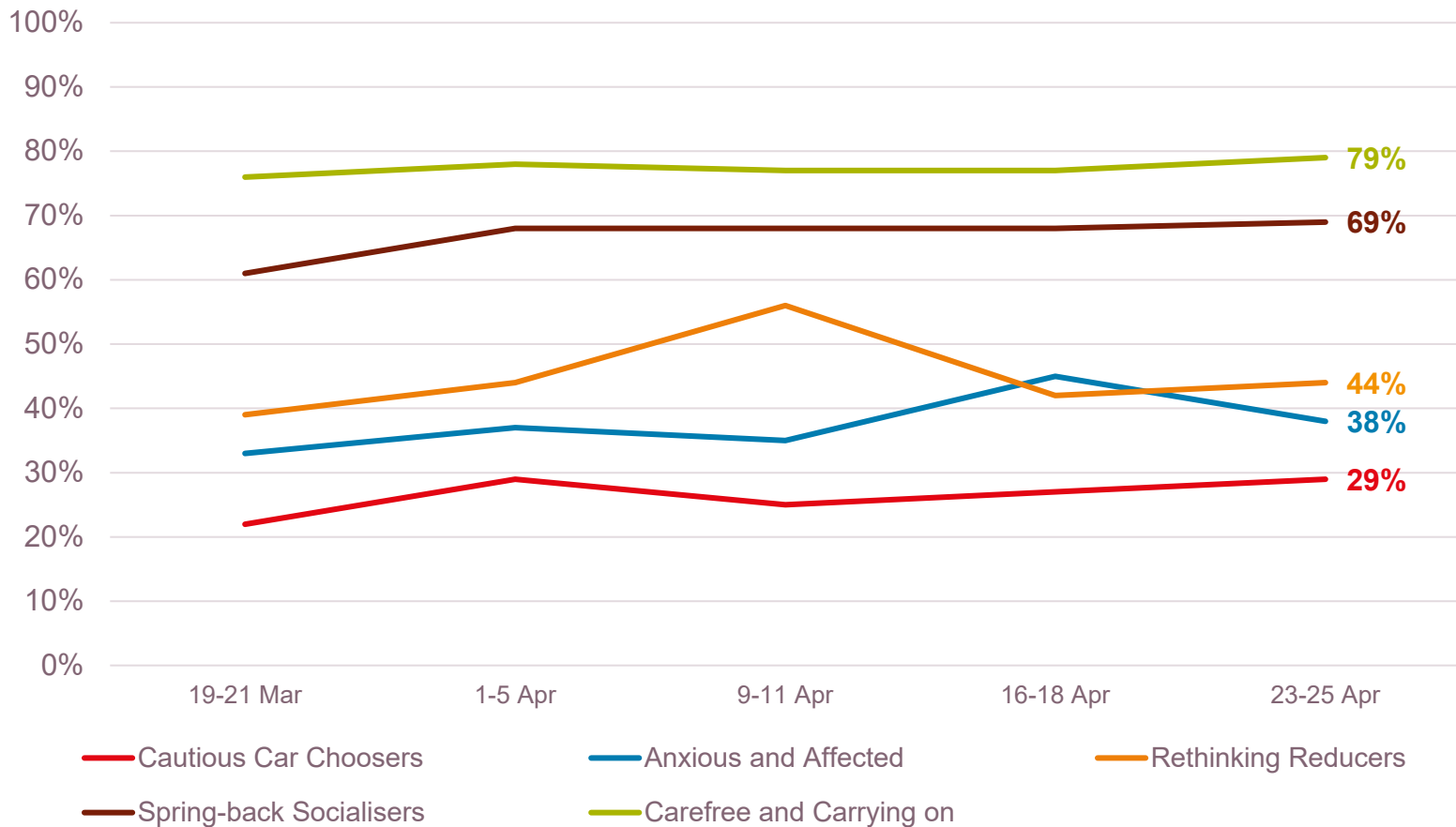
Proportions not using public transport because they feel that it is not safe to do so



----- Changed from 'last two weeks' to 'last seven days' at week 40 (1-5 April)

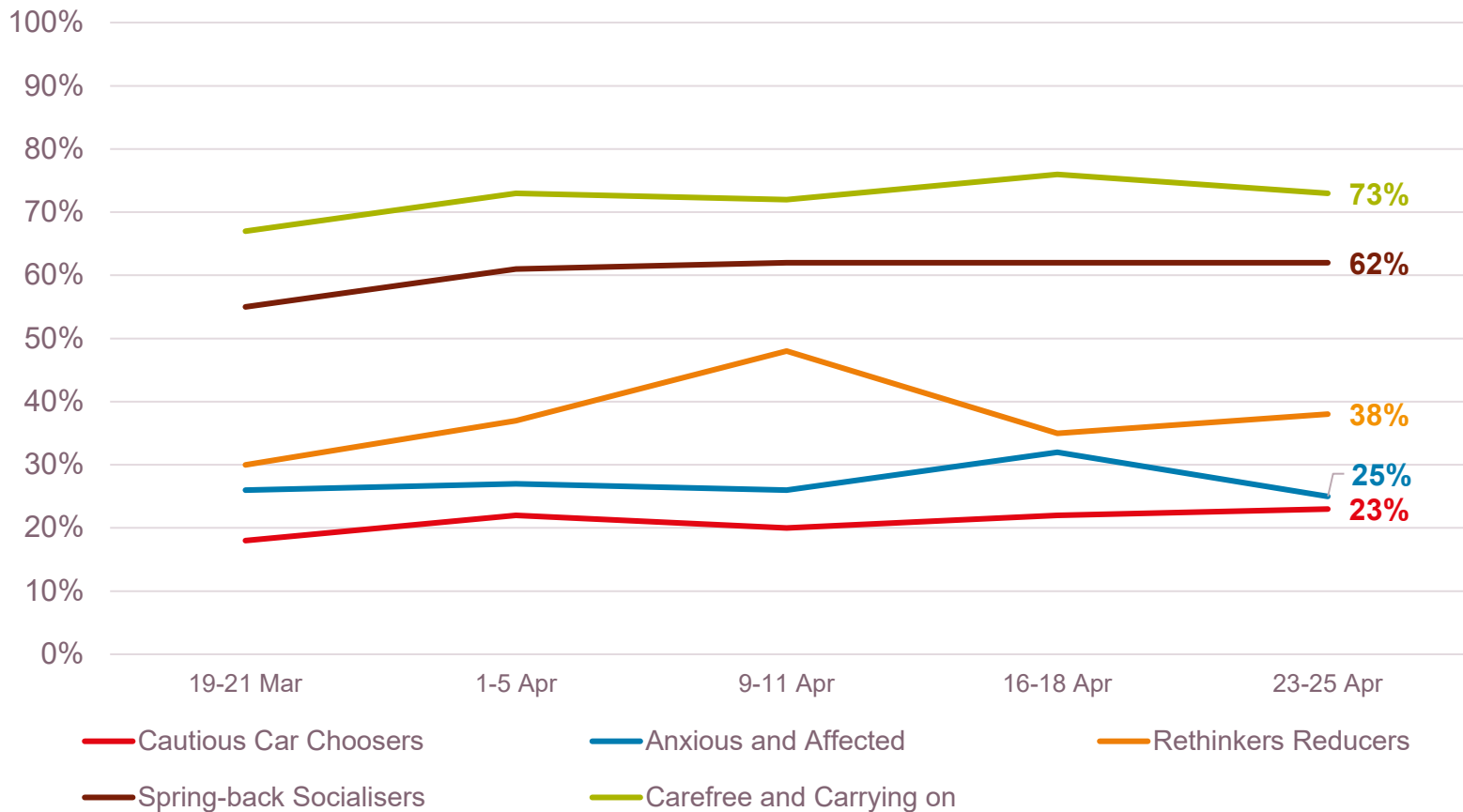
**Among those who have not used a train in the last seven days, those who are in the Carefree and Carrying on segment are more likely than others to say that they would feel safe to do so**

### How safe would you feel making a journey by train?



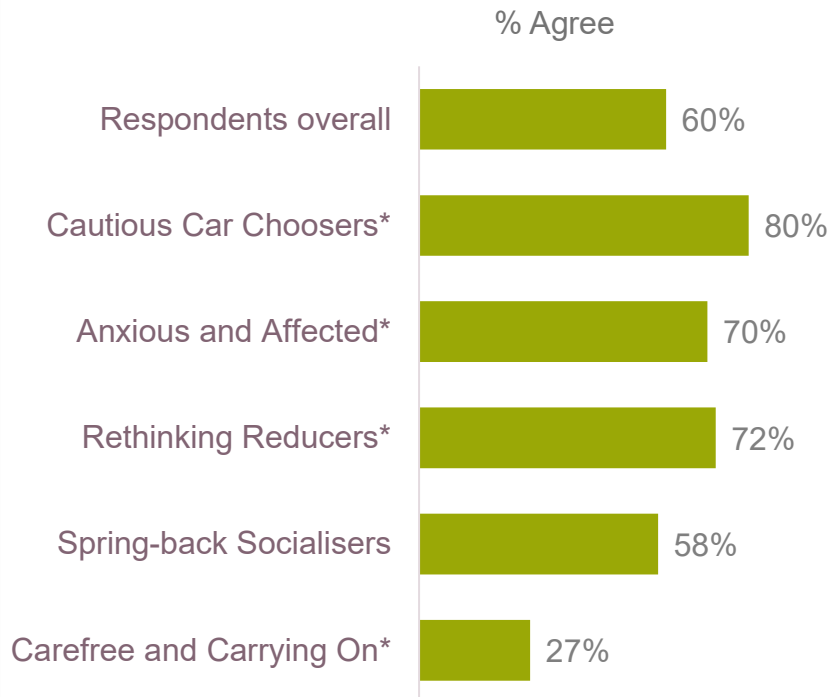
**Among those who have not used a bus in the last seven days, those who are in the Carefree and Carrying on segment are again more likely than others to say that they would feel safe to do so**

**How safe would you feel making a journey by bus?**

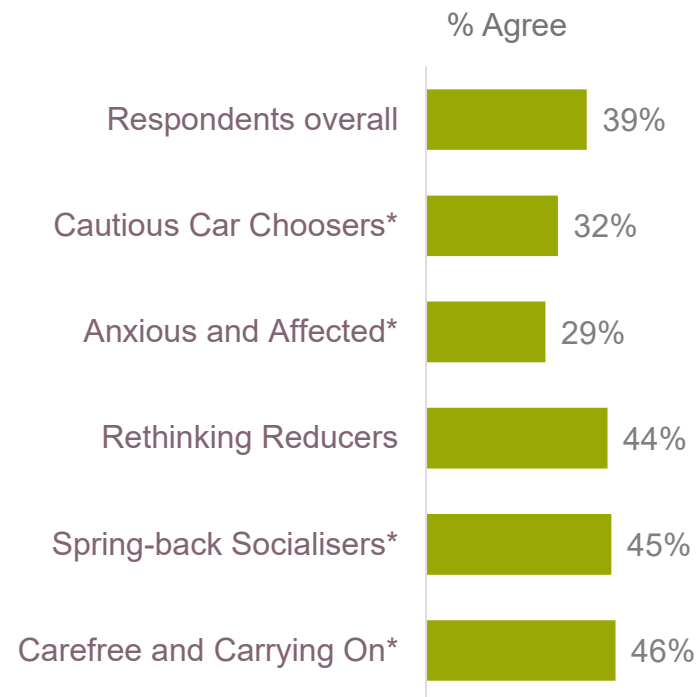


**Among those to whom the question is applicable, those in the Cautious Car Choosers segment are most likely to need social distancing enforced on public transport to encourage them to use it. Those in the Carefree and Carrying on segment are generally more relaxed.**

**'I won't use public transport unless social distancing is in place'**



**'As long as passengers are wearing face coverings, relaxing the social distancing on public transport makes sense to me'**

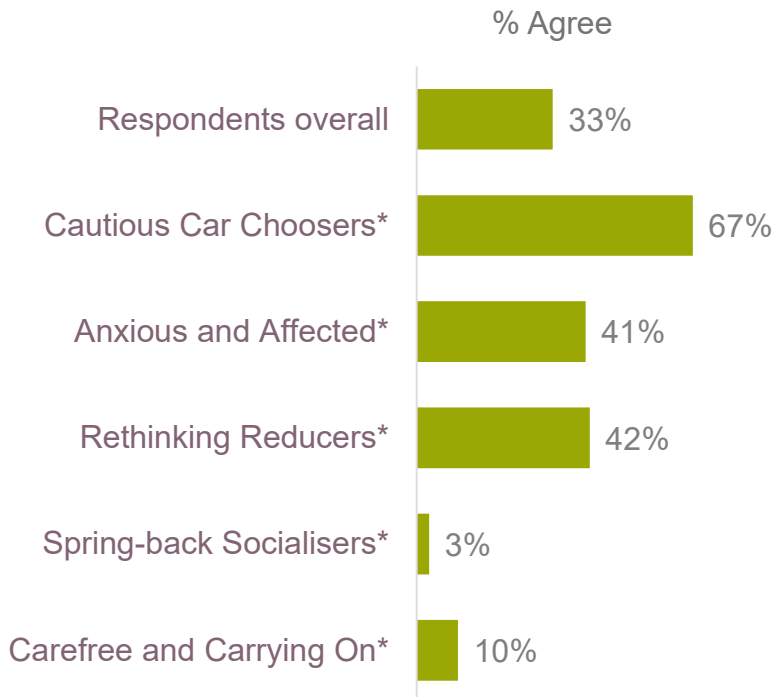


Base excludes don't know/not applicable answers

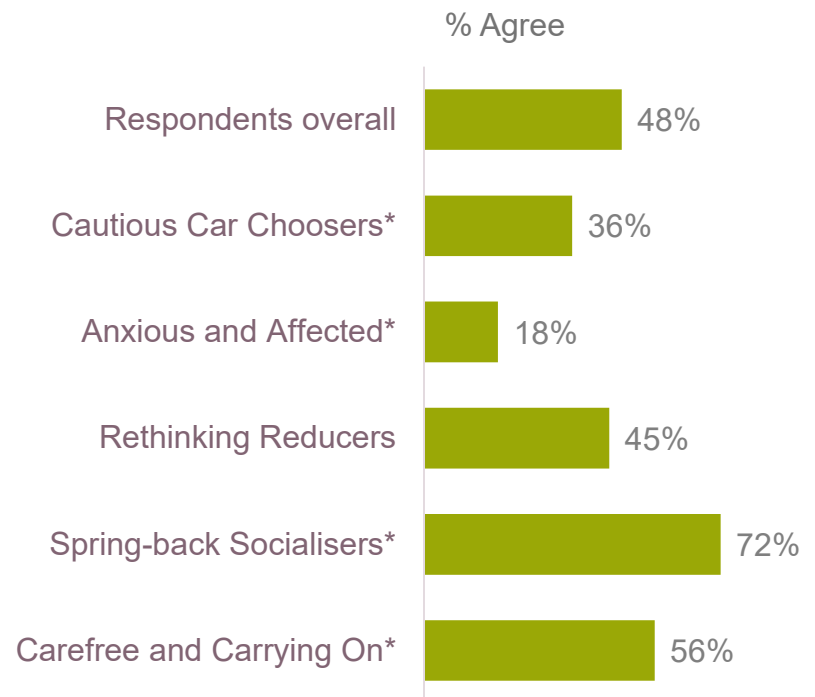
\* Denotes statistically significant difference from respondents overall

**Those in the Cautious Car Choosers segment are also more likely than others to say that they will never again feel completely comfortable on public transport. Those in the Anxious and Affected segment are least likely to feel that enough is being done to ensure coronavirus safety.**

**'I will never again feel completely comfortable on public transport'**



**'Enough is being done to ensure coronavirus safety on public transport'**



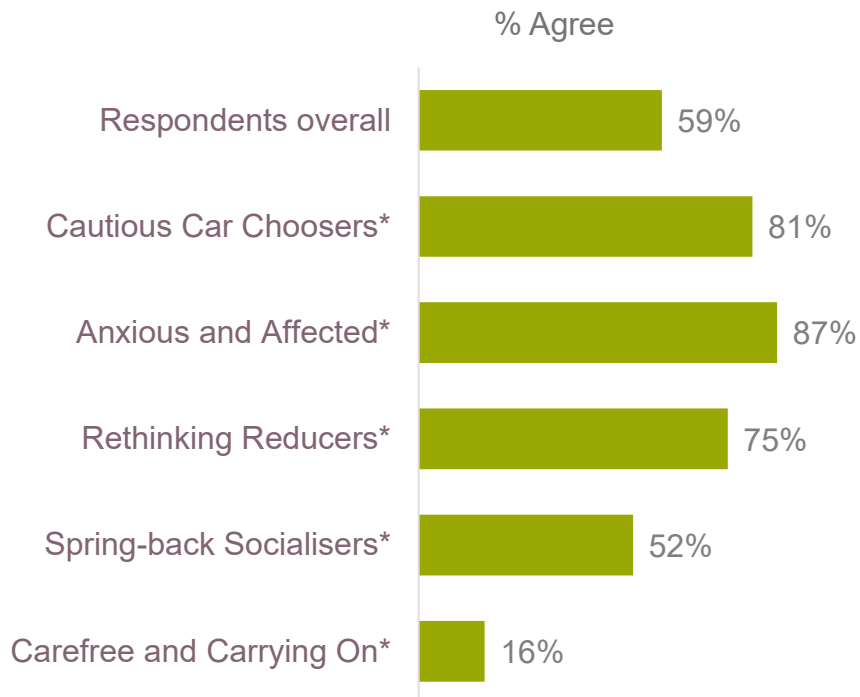
Base excludes don't know/not applicable answers

\* Denotes statistically significant difference from respondents overall



## Those in the Anxious and Affected segment are also more likely than others to say that coronavirus is a major concern for them

'The coronavirus is a major concern for me'



Base excludes don't know/not applicable answers

\* Denotes statistically significant difference from respondents overall



# 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.

# Sample breakdown – week 43

## Sample size by segment

	Total	Cautious Car Choosers	Anxious and Affected	Rethinking Reducers	Spring-back Socialisers	Carefree and Carrying On	Unsegmented
Wave 43	2017	545	284	174	500	458	56

## 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.**