

Covid-19 travel segmentation

26 April - 9 May analysis
May 2021



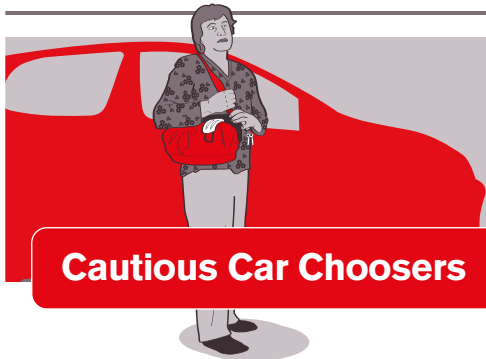
Meet our segments



Rethinking Reducers



Carefree and Carrying on



Cautious Car Choosers



Anxious and Affected



Spring-back Socialisers

Public transport – giving it a go?

We've now been using our Travel During Covid-19 survey to track our five new segments since Mid-March – this is our second update. This report shows us how the segments are feeling about public transport and Covid-19 in the run up to next relaxation of restrictions, when more indoor activities will be allowed. The next report, in two weeks' time, will show the initial impact of that relaxation. More information on each segment is available on page 28.

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. Overall there's a finely balanced split. Around half fall into either the Carefree and Carrying on or Spring-back Socialiser segments - feeling more confident including about public transport - but a half remain in one of the remaining segments more nervous about Coronavirus and returning to travel.

As we have noted before, 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 amongst the people in these segments will be vital for public transport to rebuild passenger numbers in the coming months.

Public transport – giving it a go? (2)

There are signs that as society opens up, coronavirus cases drop ever lower, the vaccination programme continues, and some sense of normality starts to return, some segments of the population are feeling more positive, and this is translating into the way they view and use public transport. One indication of this is that our least anxious segment, Carefree and Carrying on, continues to grow, now accounting for a quarter of the GB population.

What remains our smallest segment (still one in ten), Rethinking Reducers, appear to be a little less cautious than they have been. They are the only segment to see a rise in public transport usage post the Bank Holiday weekend, and those of them who have not used public transport in the last seven days are less likely than they were to be avoiding it or think it is not safe. An increasing number (now over half) think it would be safe to travel by train, which as they were previously more likely users of train, particularly in London, is an important development. The same is true of bus for this segment, but to a lesser extent.

All of this points to a segment who may be venturing out for the first time (they are far less reliant on public transport than the Anxious and Affected).

Public transport – giving it a go? (3)

Critically they are the segment where their own experience or word of mouth is likely to have the greatest impact, which emphasizes the need to ensure that the first journey back is a good one. It is perhaps therefore no surprise that they also look to the operator to provide a Covid-safe journey to encourage them back to public transport. Although the vaccination programme and general Covid levels also play an important part in making this segment feel more comfortable using public transport.

There are signs that the most anxious segment that has historically been a significant user of public transport, Anxious and Affected, is getting smaller. Nonetheless, while this segment is still the most likely to be using public transport now, it is also still most likely to be avoiding public transport where it can (although it is the most reliant on it). The Anxious and Affected who have not travelled in the last seven days are amongst the least likely to think trains or buses would be safe, although perceptions are much less negative for train. A Covid-safe journey and the vaccination programme/general Covid levels will have the most impact on this segment - the former operators can continue to influence.

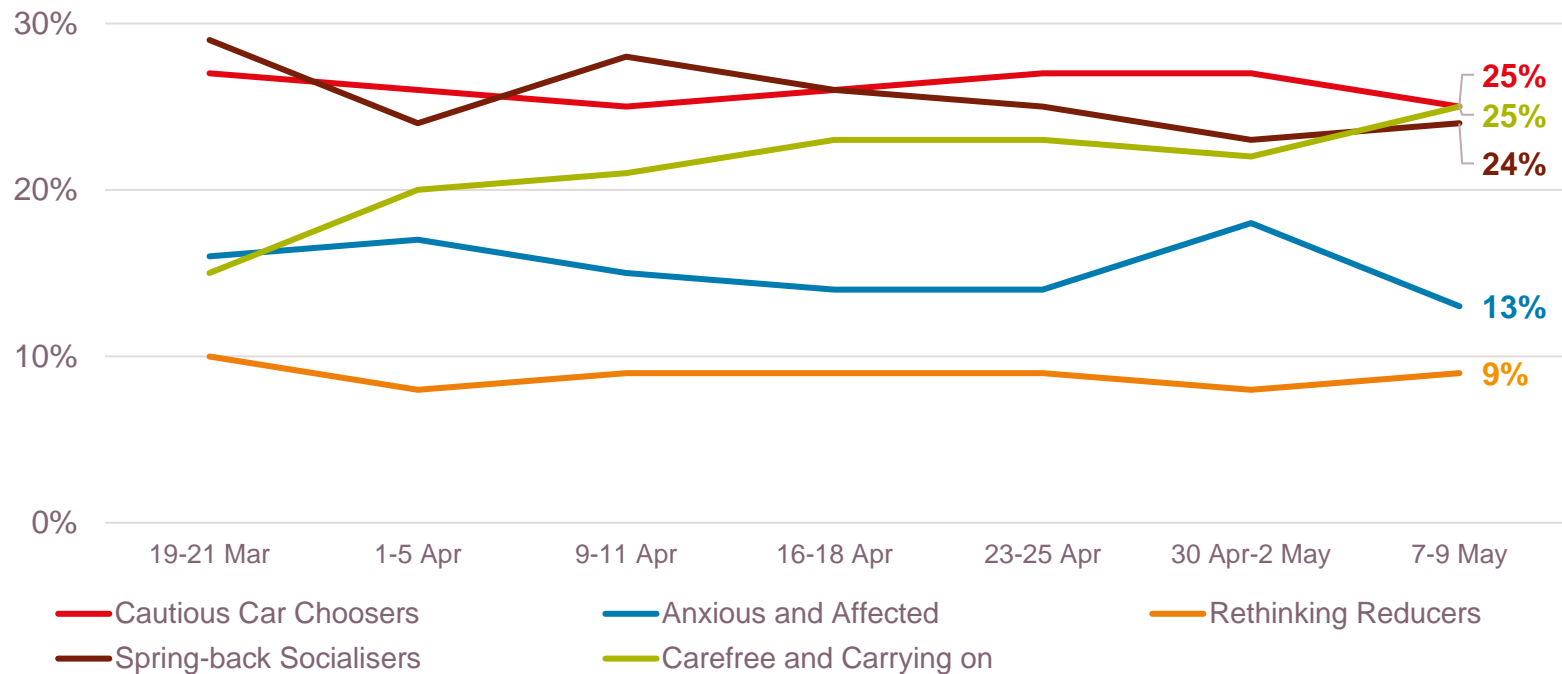
Public transport – giving it a go? (4)

Spring-back Socialisers, are, alongside Carefree and Carrying On, as their name might suggest, most likely to be making leisure journeys in the last seven days. Spring-back Socialisers who haven't travelled by train or bus in that period generally think they would be safe – they are the segment most likely to waiting for a reason to travel to get them back on public transport. The vaccination programme, Covid levels, and a Covid safe journey are important to all segments, but Spring-back Socialisers are most receptive to messaging from either the government or operators to get them back on board.

The size of the segments are changing 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.

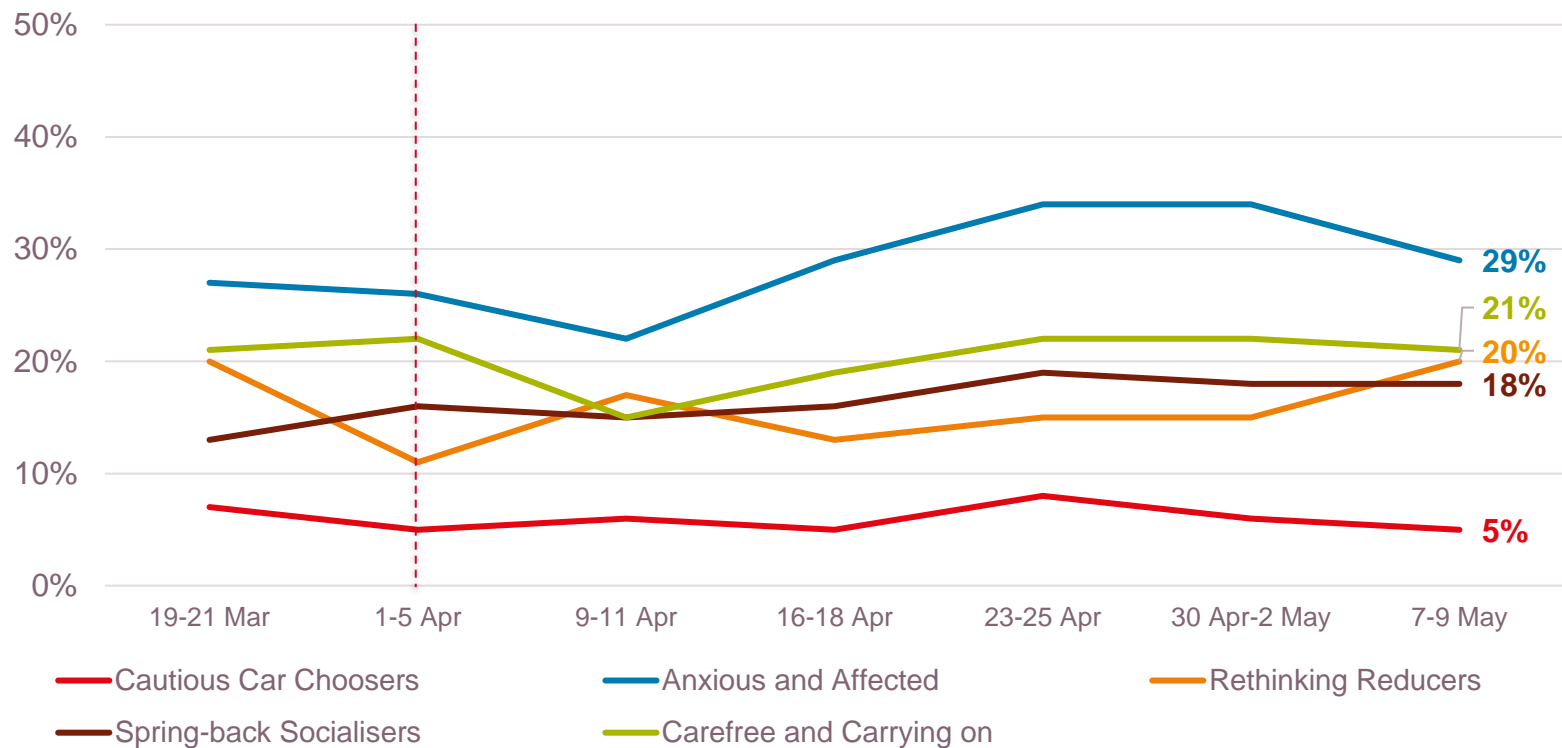
Segment size*



*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

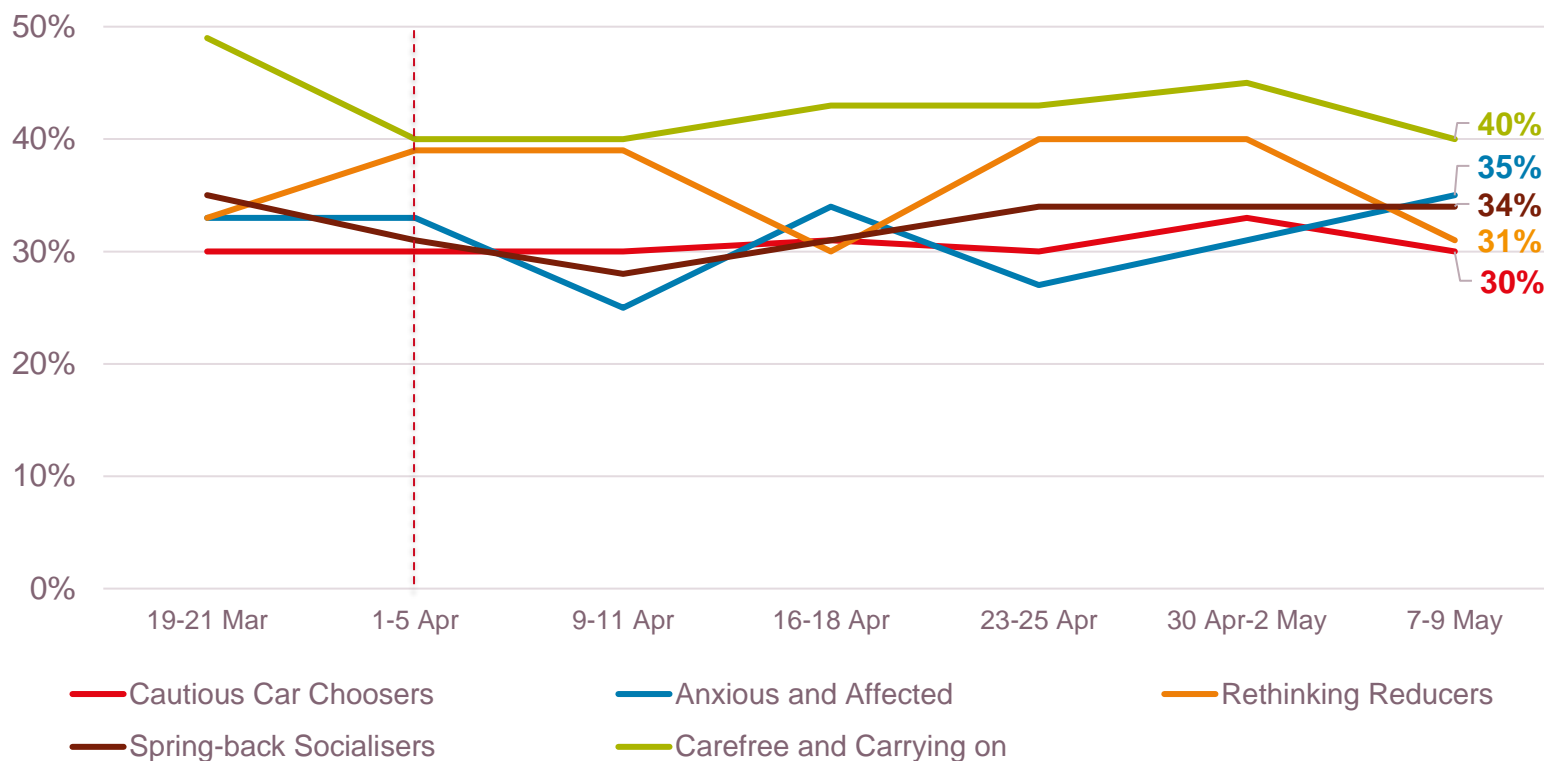
Use of public transport in the last seven days



----- 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

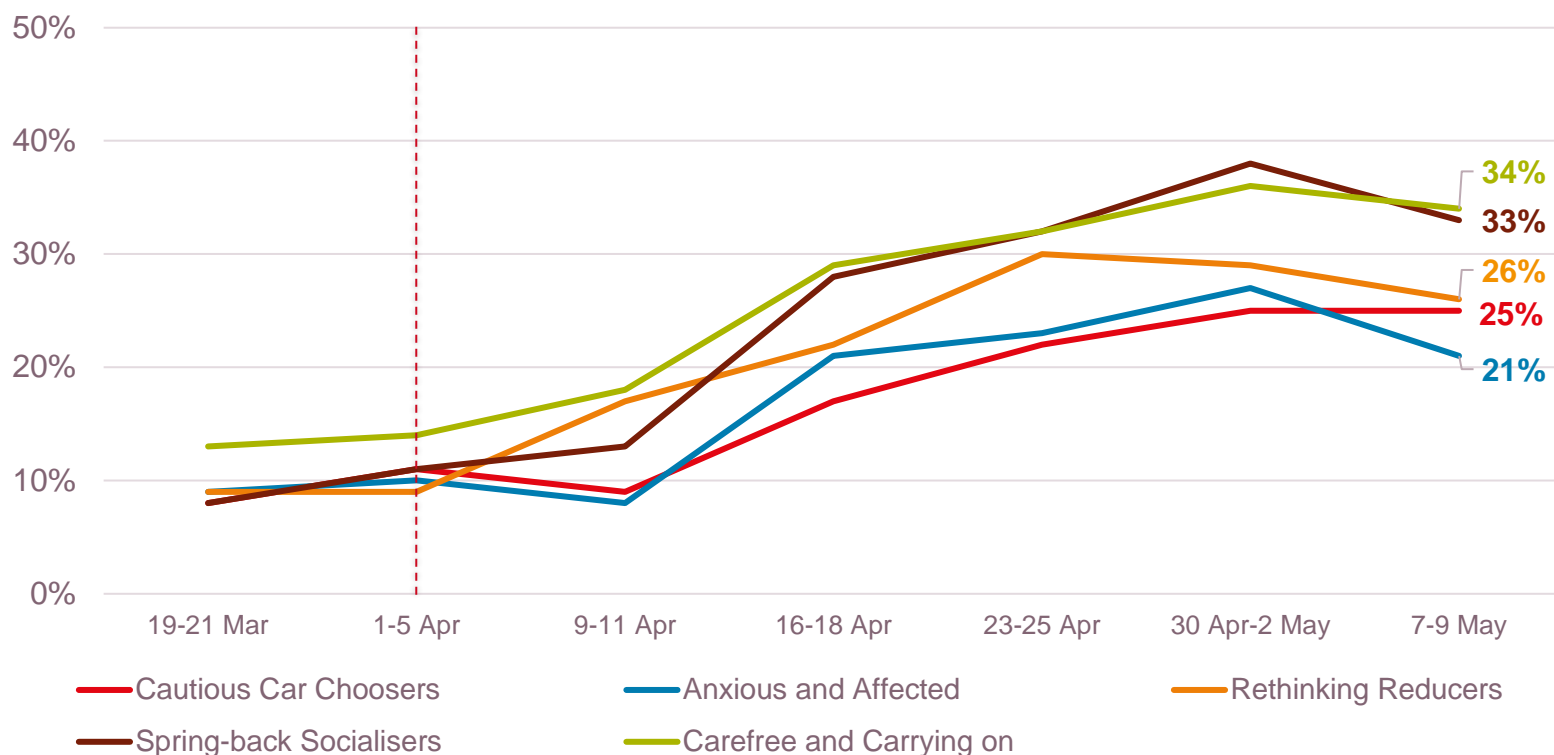
Journeys made to or from work (by any mode of transport)



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

The Carefree and Carrying on segment and the Spring-back Socialisers are more likely than others to be making journeys for leisure reasons

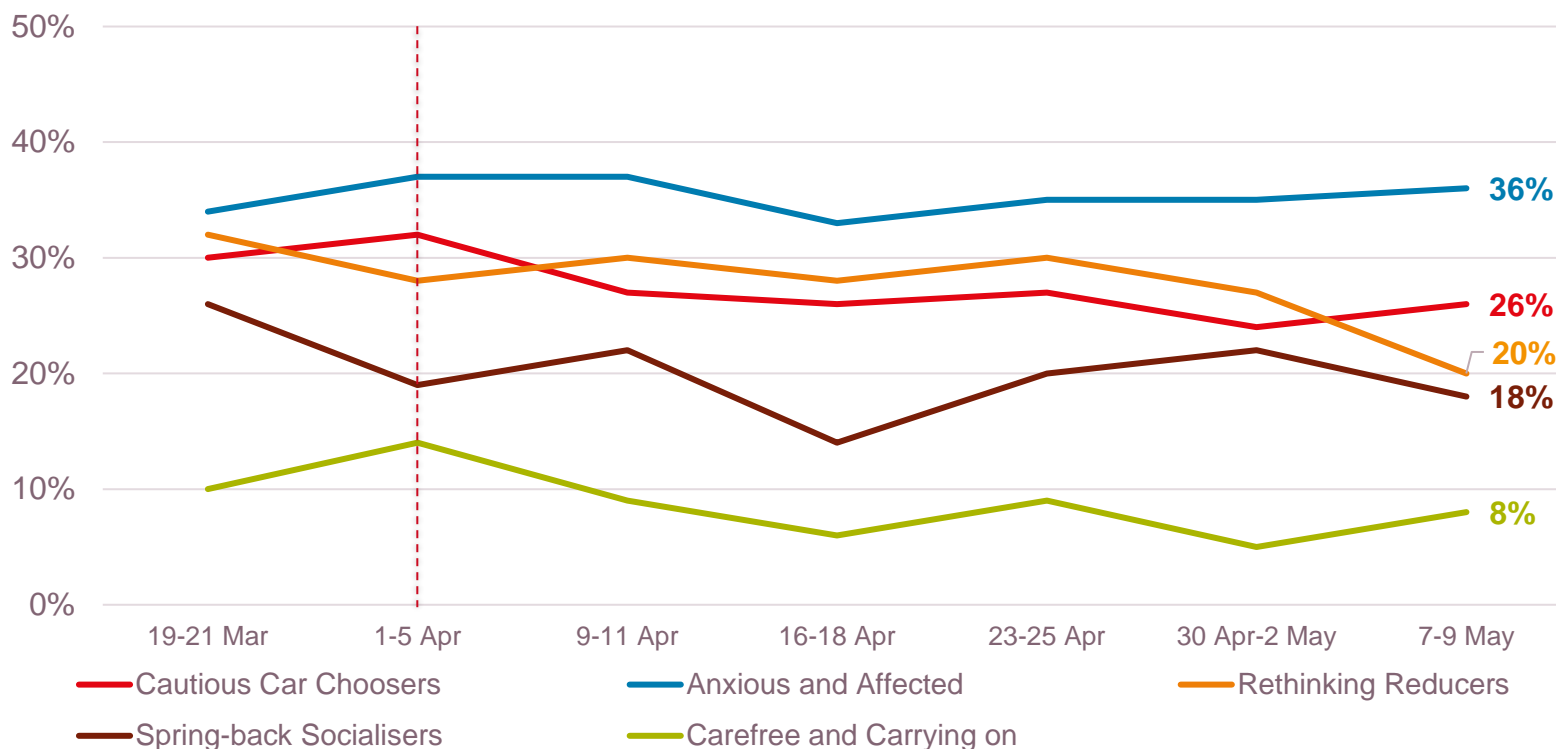
Journeys made for other leisure reasons (by any mode of transport)



----- 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

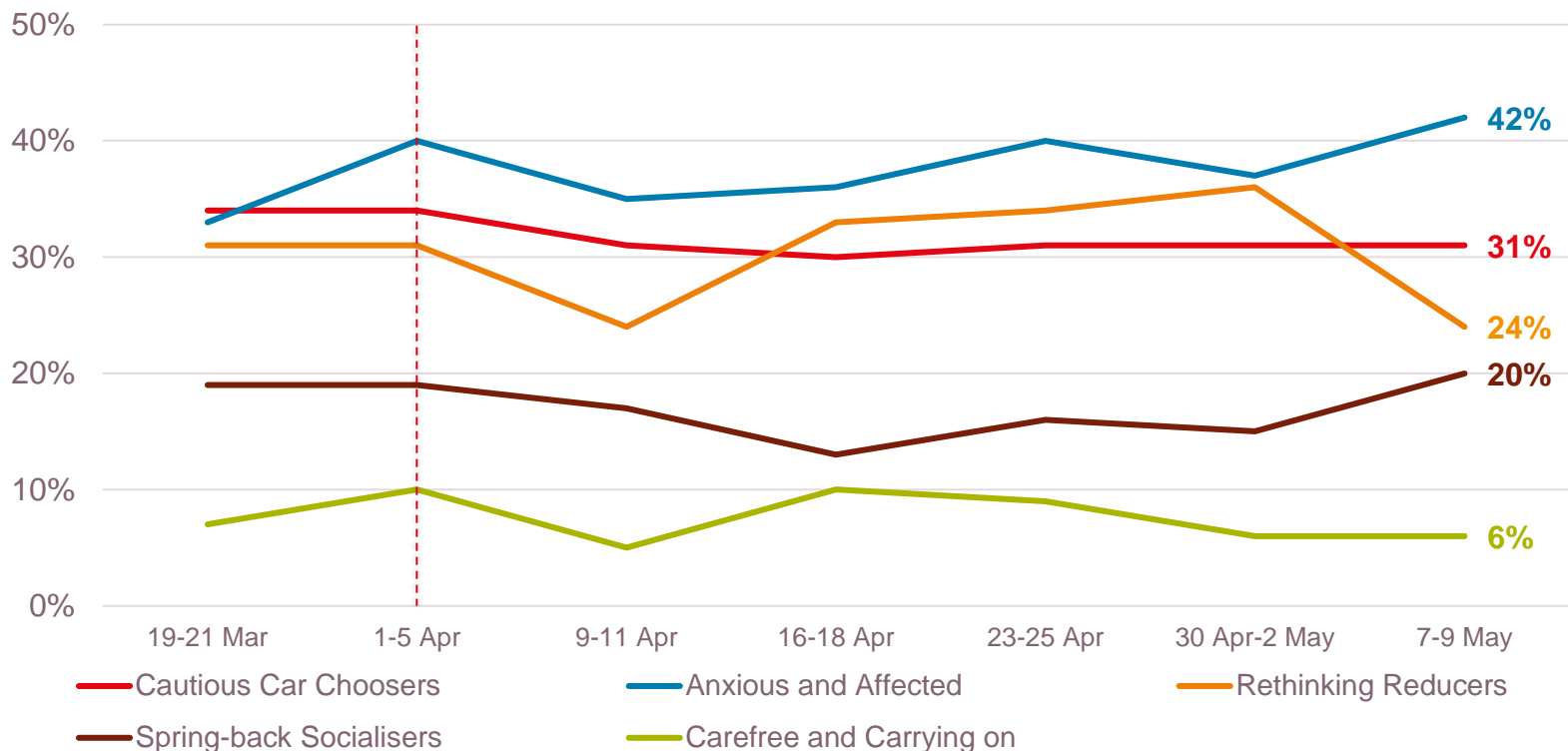
Proportions avoiding using public transport



----- 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

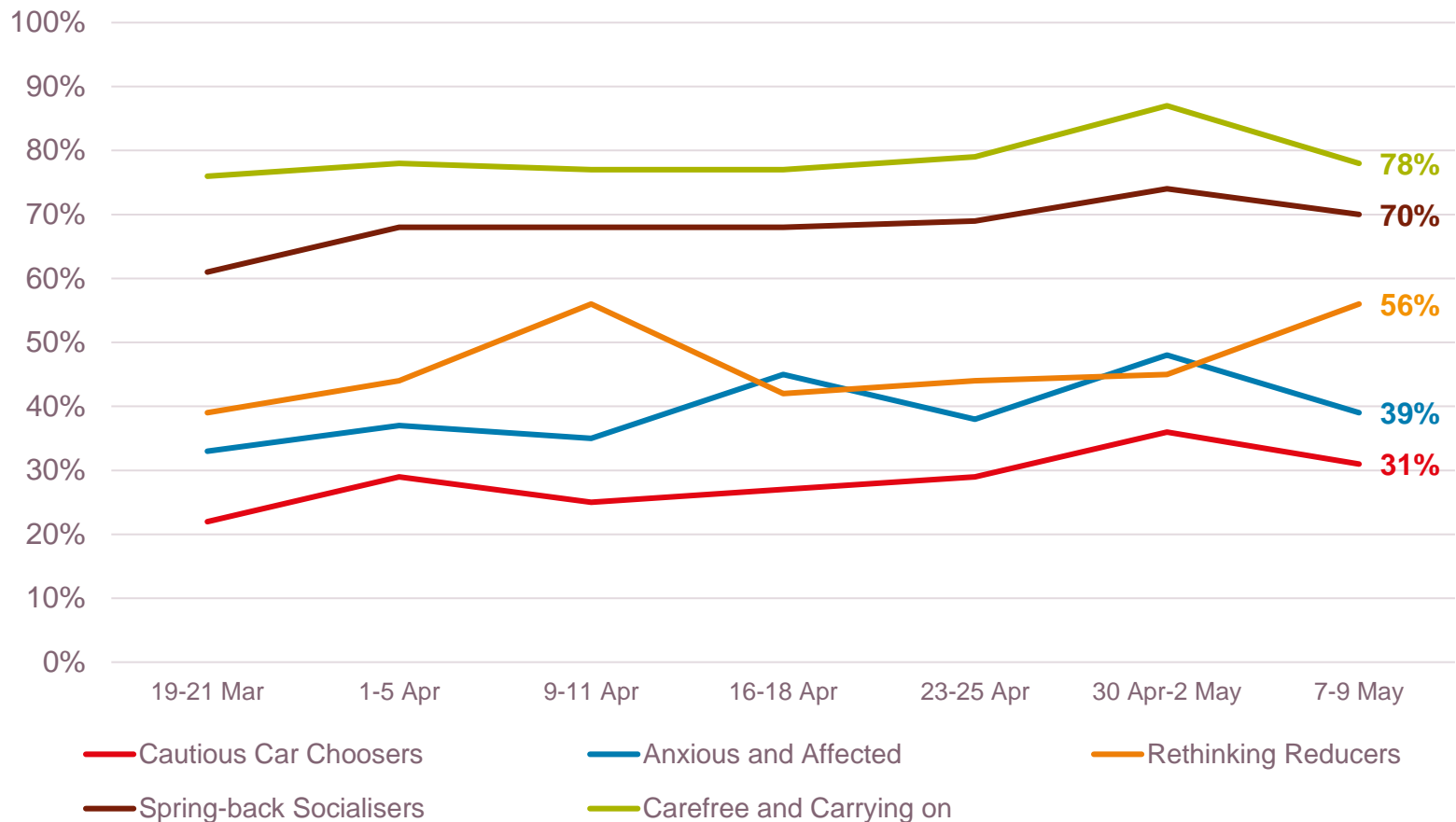
Proportions not using public transport because they feel that it is not safe to do so



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

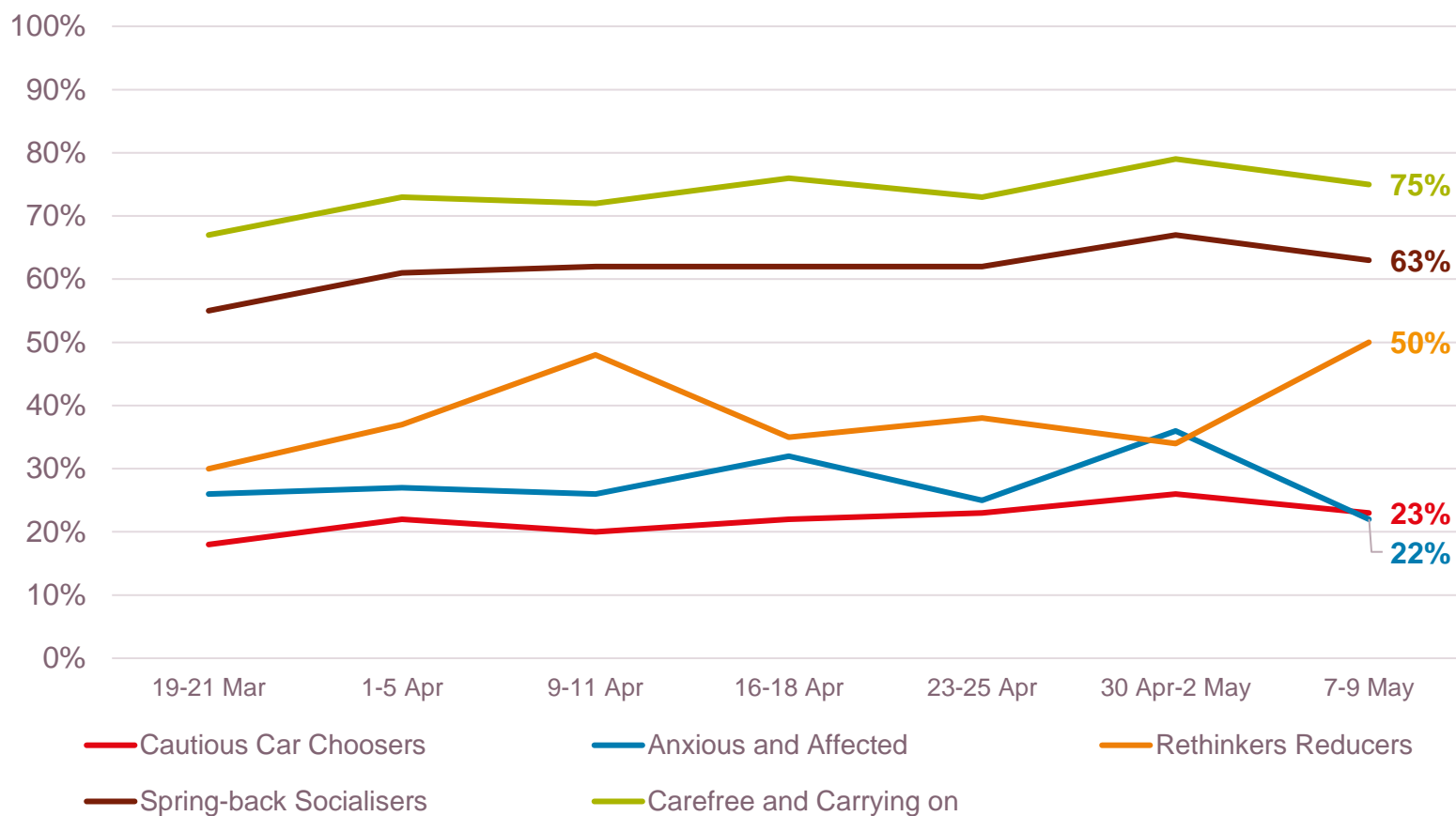
Among those who have not used a train in the last seven days, those who are in the Carefree and Carrying on segment are more likely than others to say that they would feel safe to do so

How safe would you feel making a journey by train?



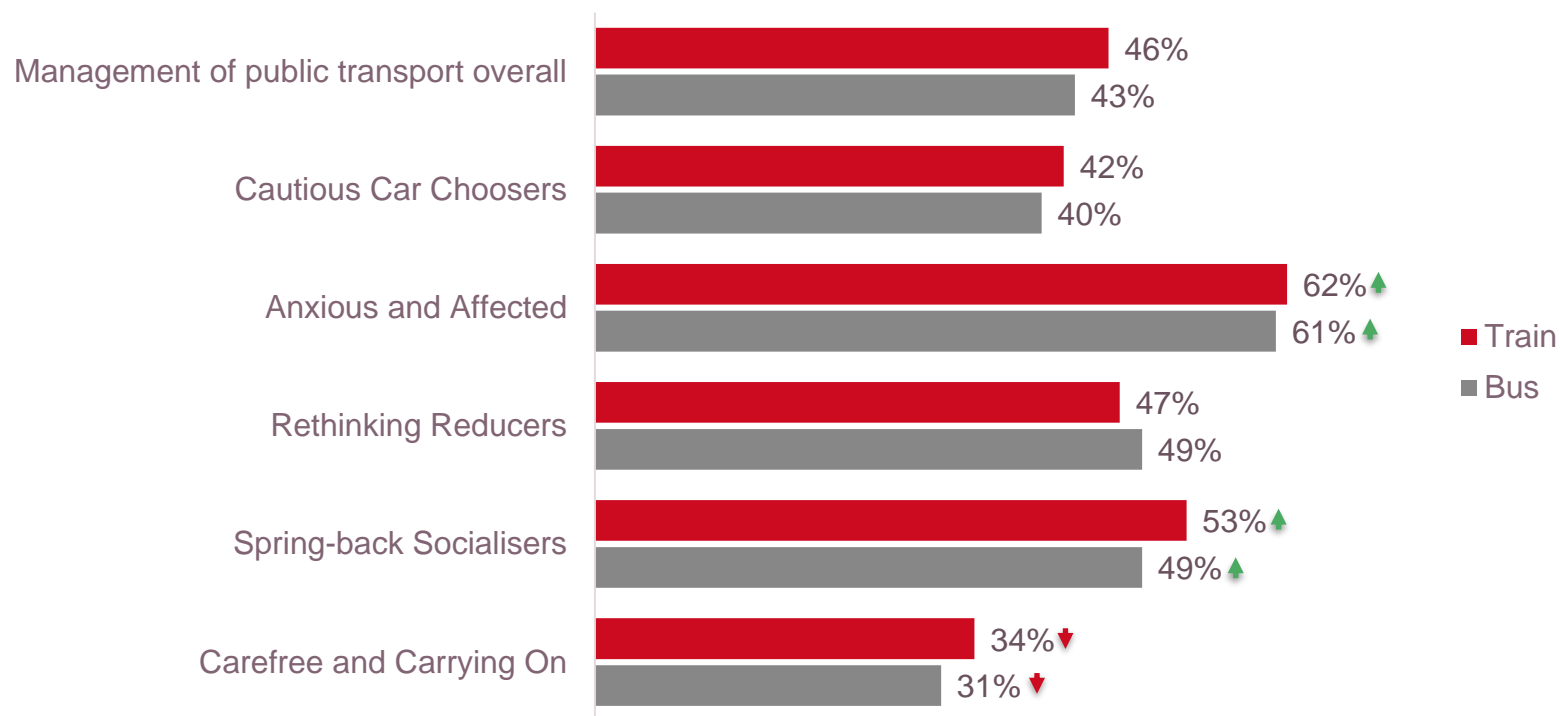
Among those who have not used a bus in the last seven days, those who are in the Carefree and Carrying on segment are again more likely than others to say that they would feel safe to do so

How safe would you feel making a journey by bus?



The Anxious and Affected are more likely than those in other segments to require enhanced measures against Covid to encourage them to use public transport

Which of the following would be most likely to encourage you to make a journey by train / bus?
Factors related to the management of public transport combined^



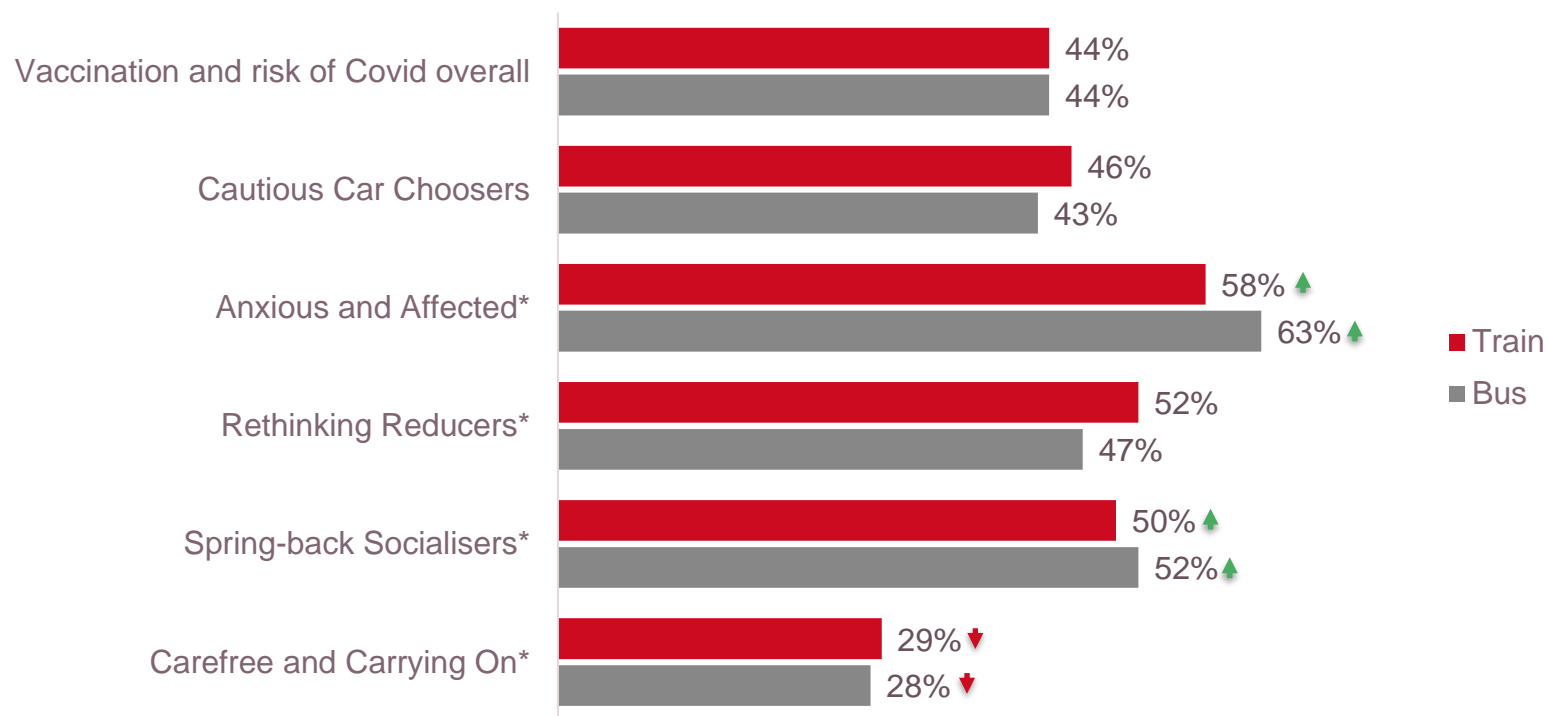
Base: Omnibus W45. All who have not used a train / bus in the last seven days (1,862 / 1,749)

^ Combines, 'more passengers wearing face coverings', 'better standard of cleanliness on board', 'better ventilation on board', 'information on how busy it will be on board' and, 'more space to social distance on board'

▼▲ Denotes statistically significant difference from respondents overall

The Anxious and Affected are also more likely than those in other segments to require more vaccinations to have been completed to encourage them to use public transport

Which of the following would be most likely to encourage you to make a journey by train / bus?
Factors related to vaccination and risk of Covid combined^



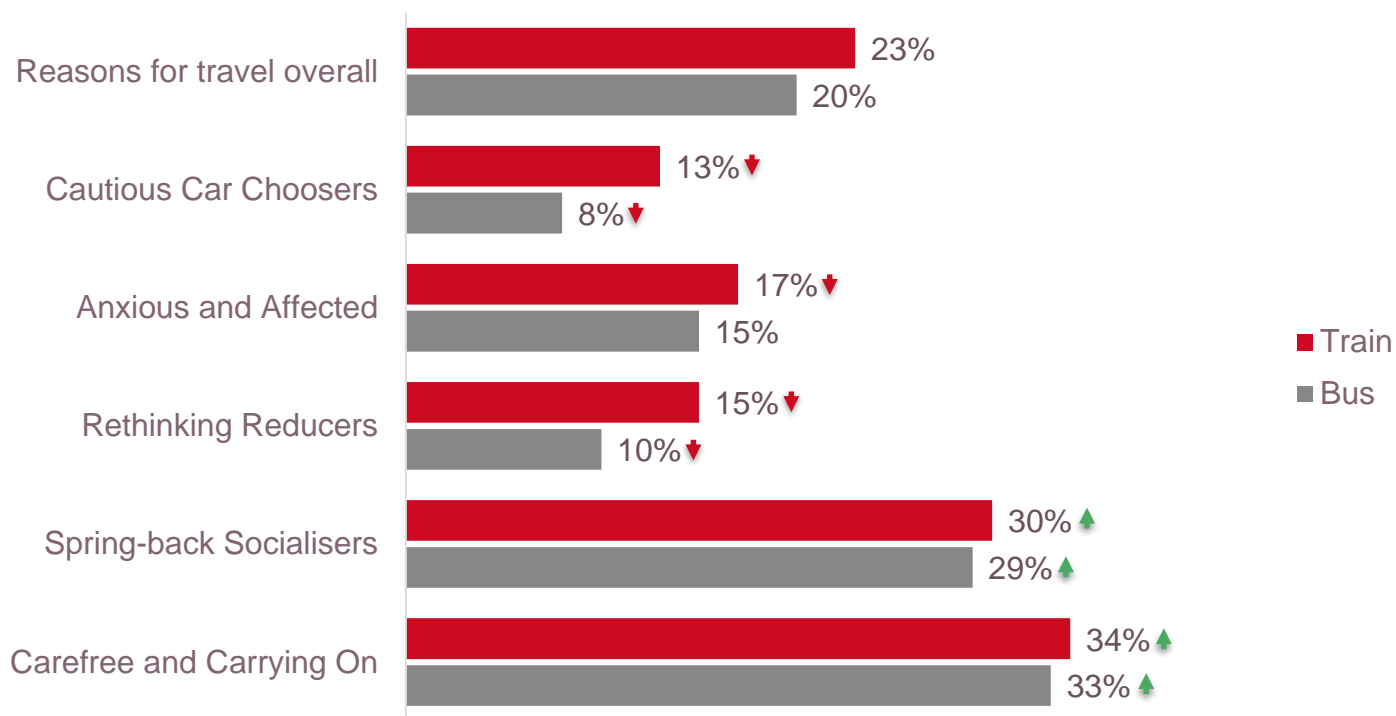
Base: Omnibus W45. All who have not used a train / bus in the last seven days (1,862 / 1,749)

^ Combines, 'when I have been vaccinated at least once', 'when I have had both doses of the vaccine', 'when more people have been vaccinated' and 'when the number of cases of Covid are lower'

▲ ▼ Denotes statistically significant difference from respondents overall

The Spring-back Socialisers and those who are Carefree and Carrying On are more likely than those in other segments to require a reason to travel to encourage them to use public transport

Which of the following would be most likely to encourage you to make a journey by train / bus?
Factors related to reasons for travel combined[^]



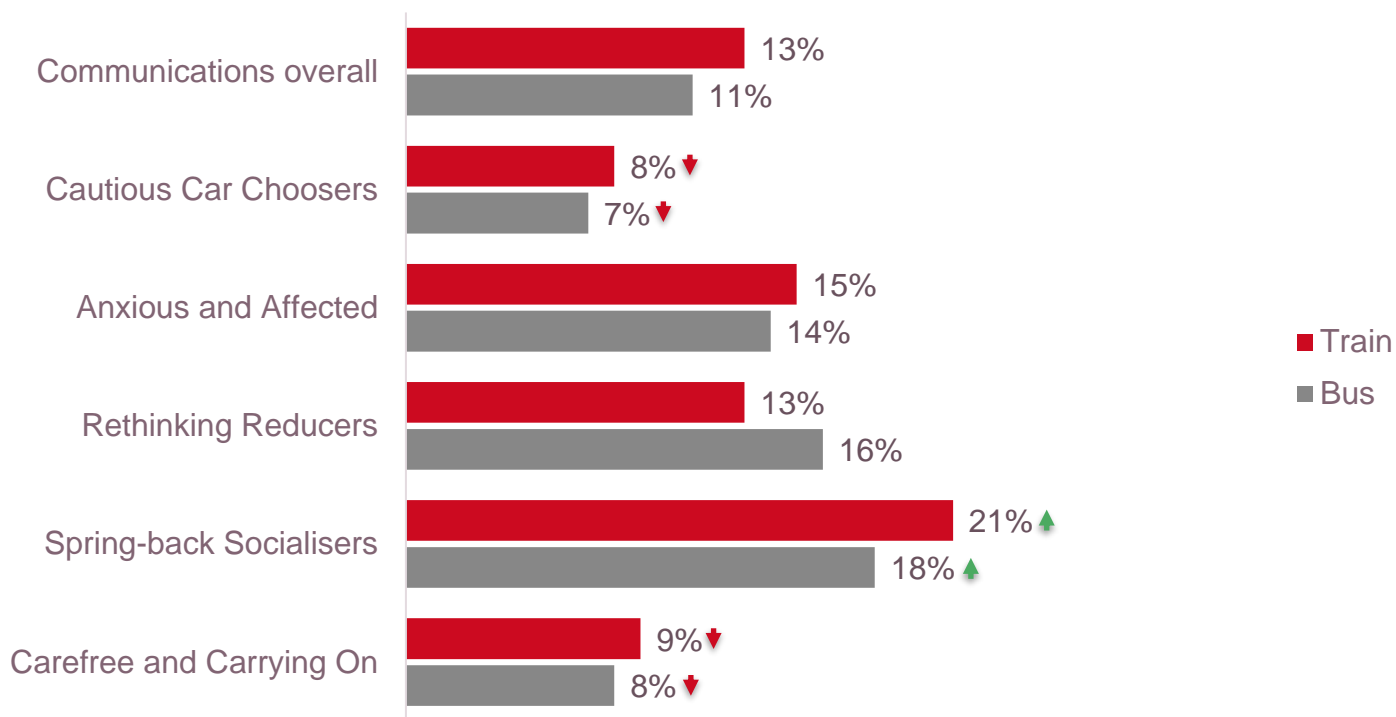
Base: Omnibus W45. All who have not used a train / bus in the last seven days (1,862 / 1,749)

[^] Combines, 'if I needed to use public transport to travel to work' and, 'just a reason to travel'

▼▲ Denotes statistically significant difference from respondents overall

The Spring-back Socialisers are more likely than those in other segments to require communications from operators and from the Government to encourage them to use public transport

Which of the following would be most likely to encourage you to make a journey by train / bus?
Factors related to communications combined[^]



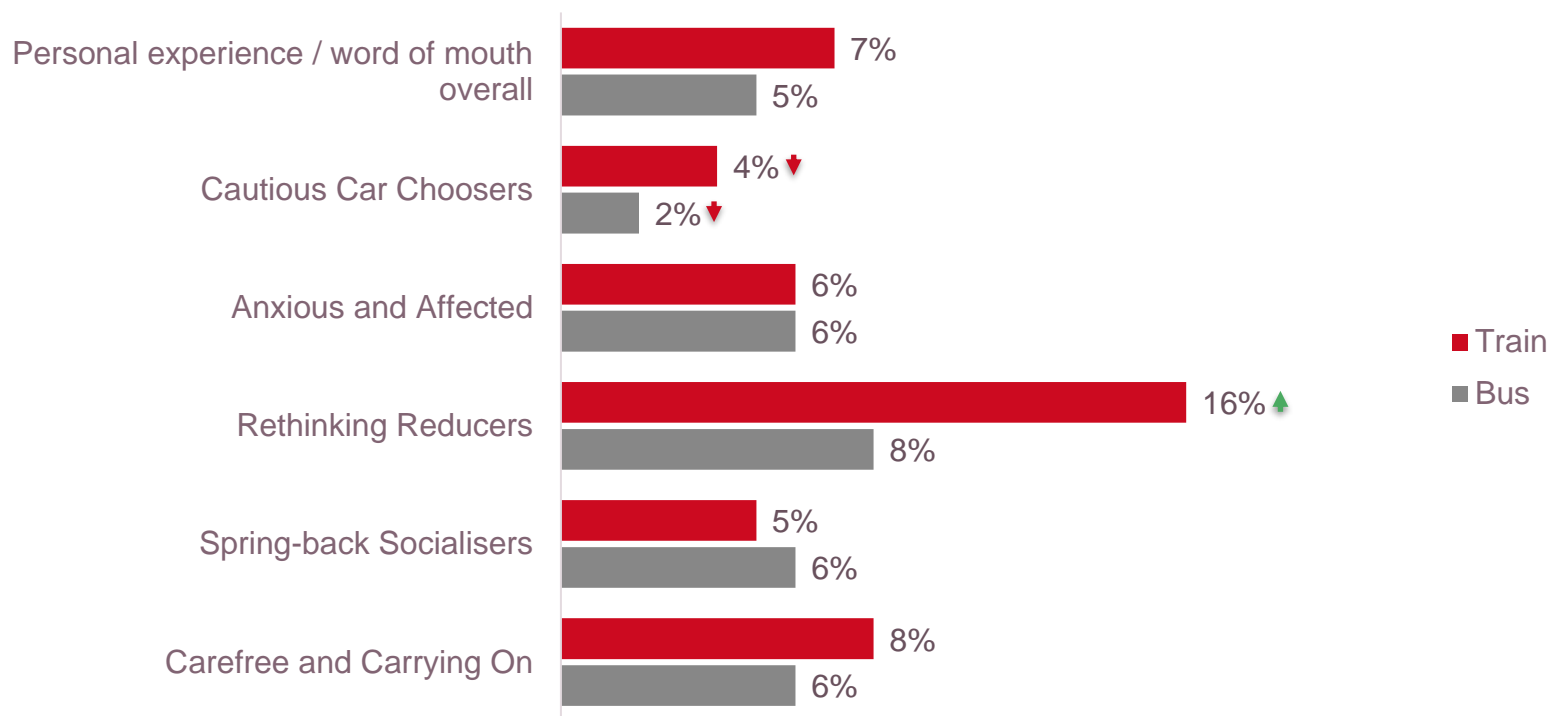
Base: Omnibus W45. All who have not used a train / bus in the last seven days (1,862 / 1,749)

[^] Combines, 'the Government promoting that it is safe to use public transport' and, 'operators promoting what they are doing to keep passengers safe'

↓ ↑ Denotes statistically significant difference from respondents overall

Rethinking Reducers are more likely than those in other segments to say that their own personal experience, or hearing about others' positive experiences would encourage them to use trains

Which of the following would be most likely to encourage you to make a journey by train / bus?
Factors related to personal experience / word of mouth combined^



Base: Omnibus W45. All who have not used a train / bus in the last seven days (1,862 / 1,749)

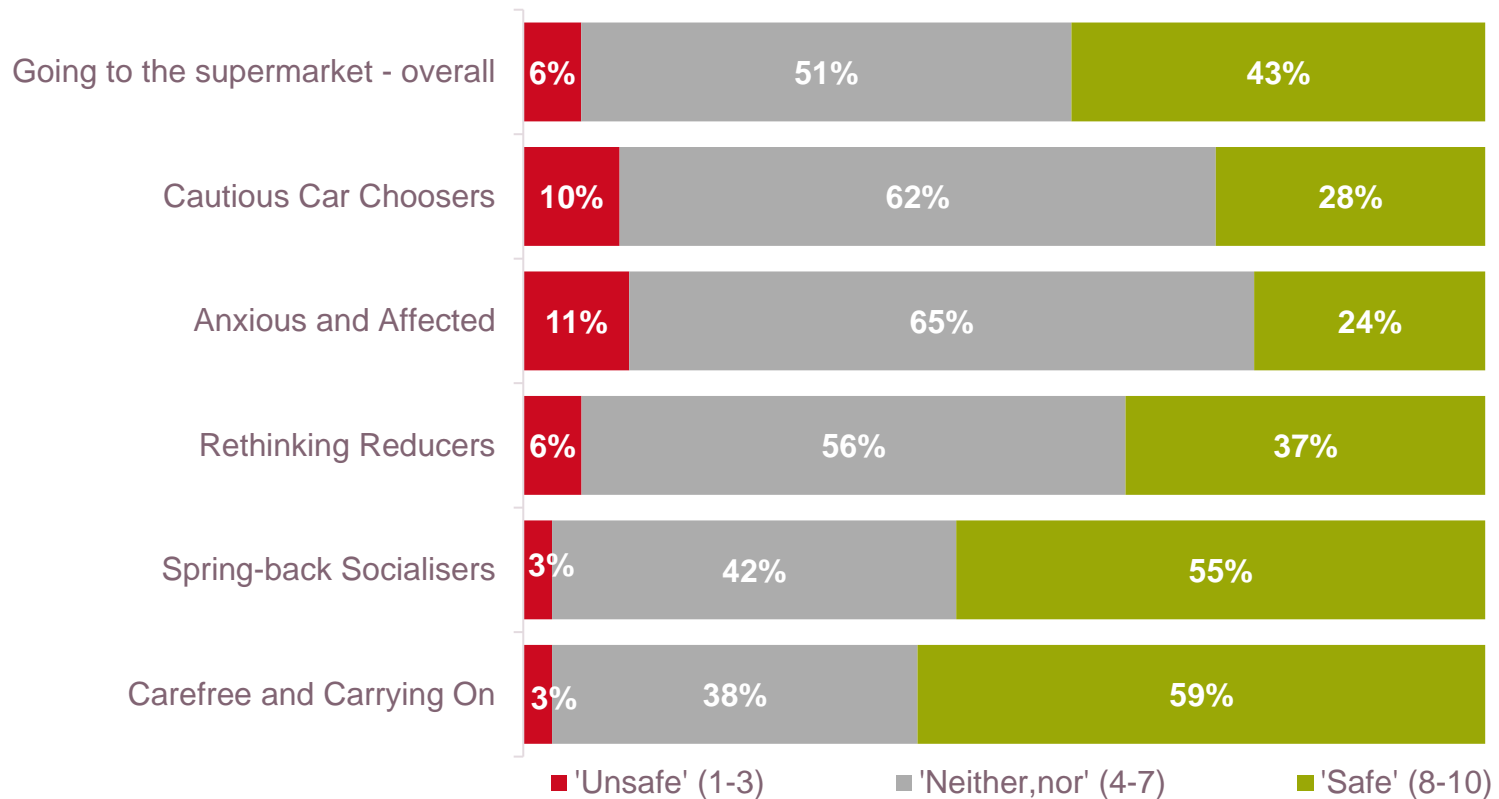
^ Combines, 'if friends, family, or colleagues say its ok to use public transport' and, 'if I've used public transport for the first time in a while and it feels ok'

▼▲ Denotes statistically significant difference from respondents overall

Spring-back Socialisers and those who are Carefree and Carrying On are more likely than others to rate going to the supermarket as 'safe'

Specifically in relation to coronavirus, on a scale of 1 to 10 where 1 is very unsafe and 10 is very safe, how safe do you consider the following activities? Going to the supermarket

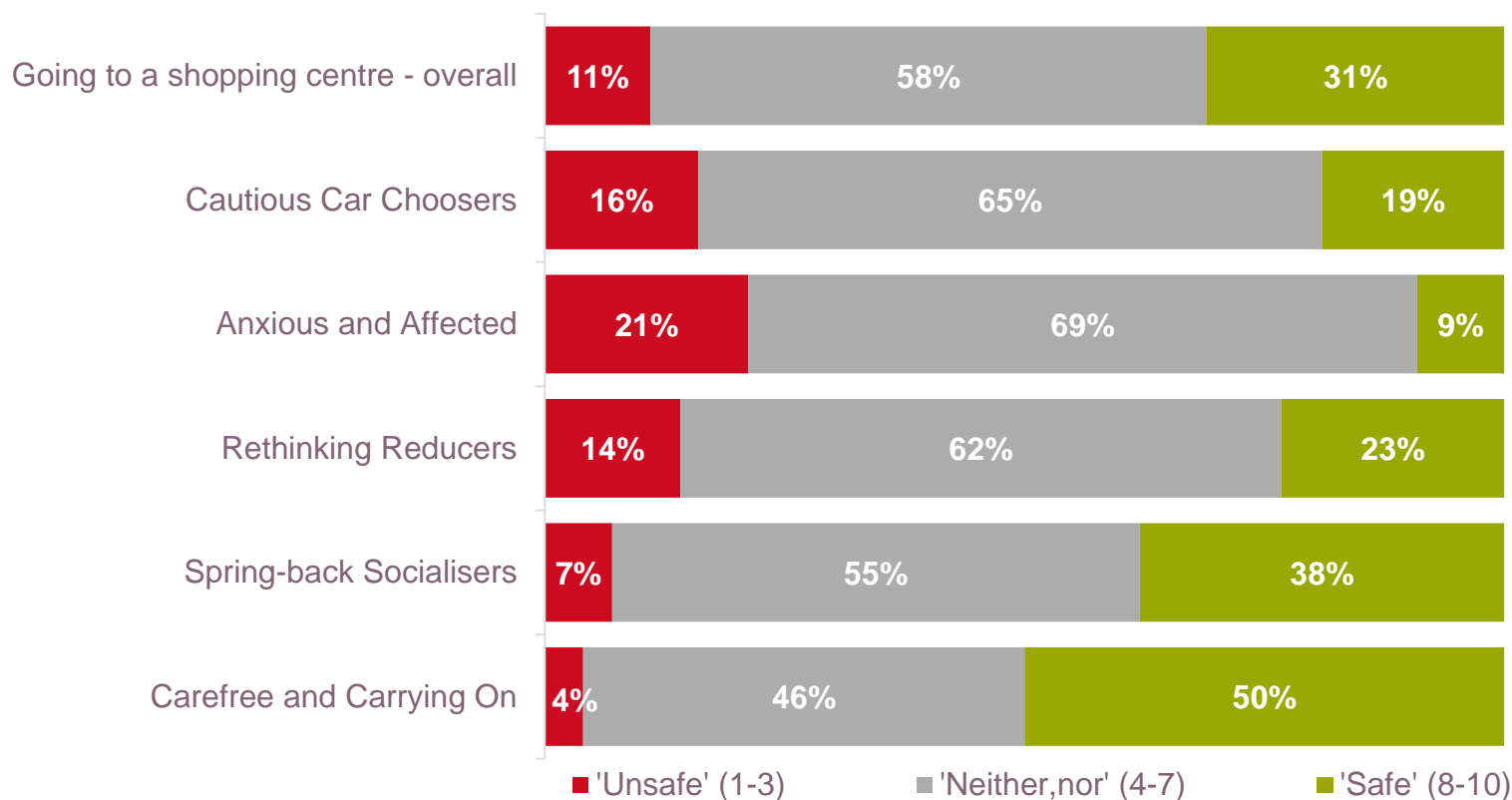
Base: W45 1,992



Spring-back Socialisers and those who are Carefree and Carrying On are more likely than others to rate going to a shopping centre as 'safe'

Specifically in relation to coronavirus, on a scale of 1 to 10 where 1 is very unsafe and 10 is very safe, how safe do you consider the following activities? Going to a shopping Centre

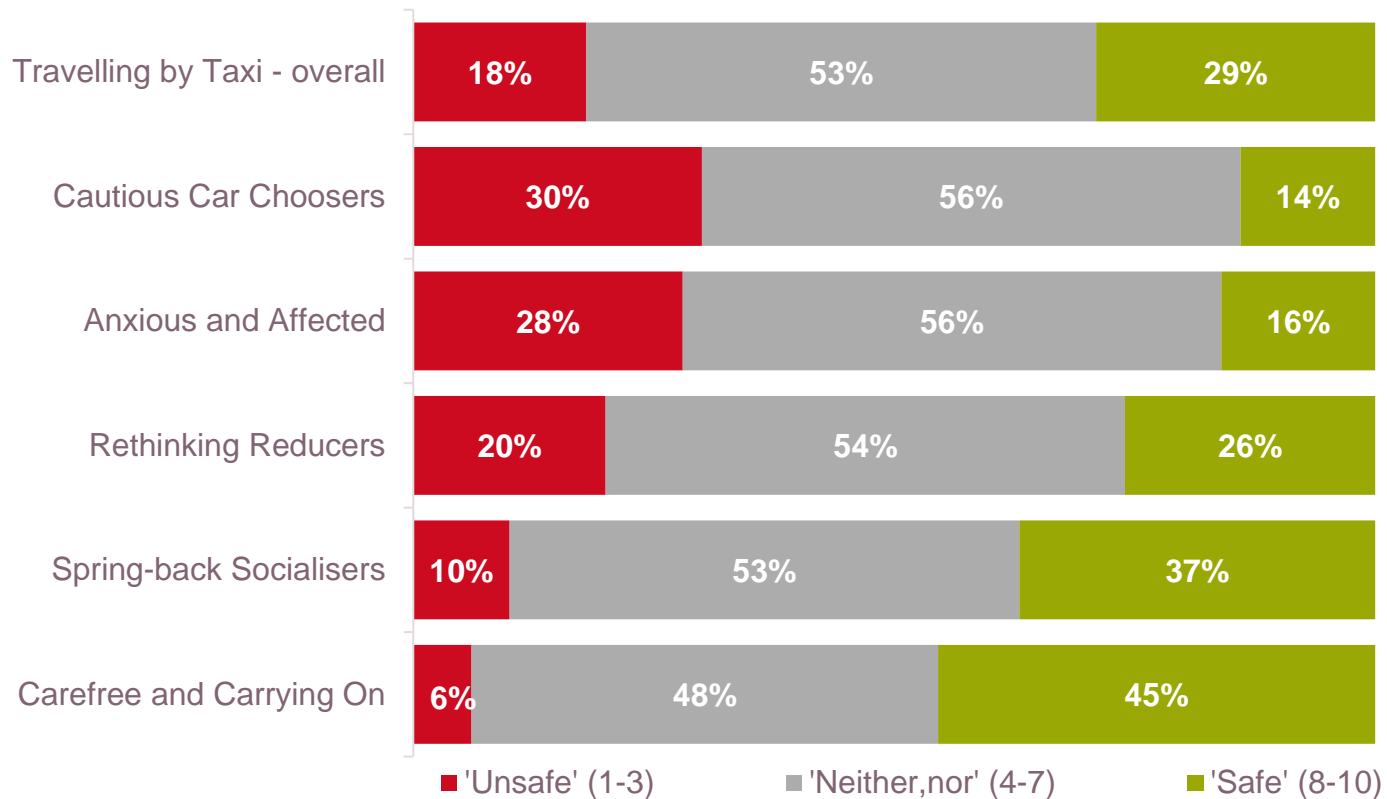
Base: W45 1,992



Spring-back Socialisers and those who are Carefree and Carrying On are more likely than others to rate travelling by taxi as 'safe'

Specifically in relation to coronavirus, on a scale of 1 to 10 where 1 is very unsafe and 10 is very safe, how safe do you consider the following activities? Travelling by Taxi

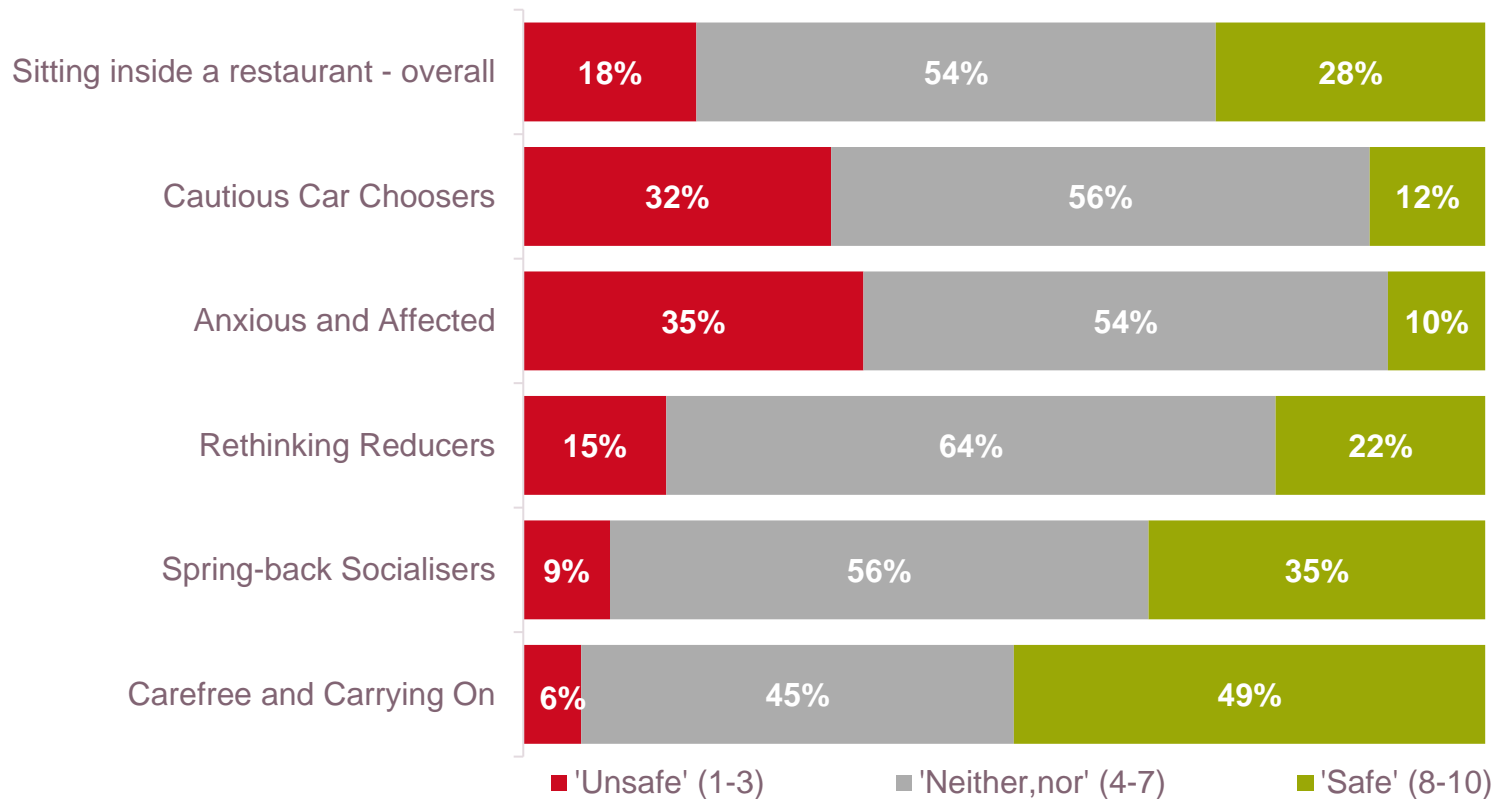
Base: W45 1,992



Spring-back Socialisers and those who are Carefree and Carrying On are more likely than others to rate sitting inside a restaurant as 'safe'

Specifically in relation to coronavirus, on a scale of 1 to 10 where 1 is very unsafe and 10 is very safe, how safe do you consider the following activities? Sitting inside a restaurant (if allowed)

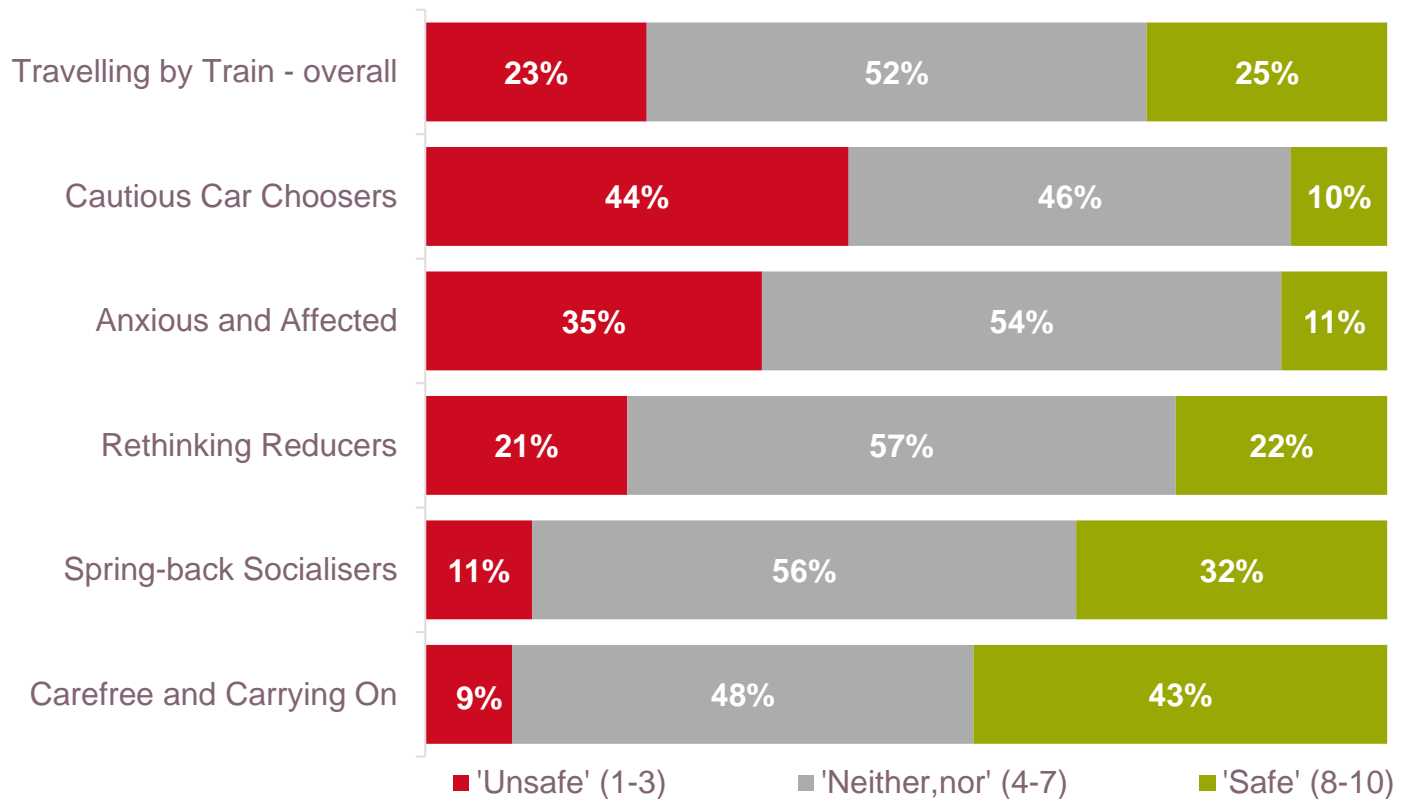
Base: W45 1,992



Spring-back Socialisers and those who are Carefree and Carrying On are more likely than others to rate travelling by train as 'safe'

Specifically in relation to coronavirus, on a scale of 1 to 10 where 1 is very unsafe and 10 is very safe, how safe do you consider the following activities? Travelling by train

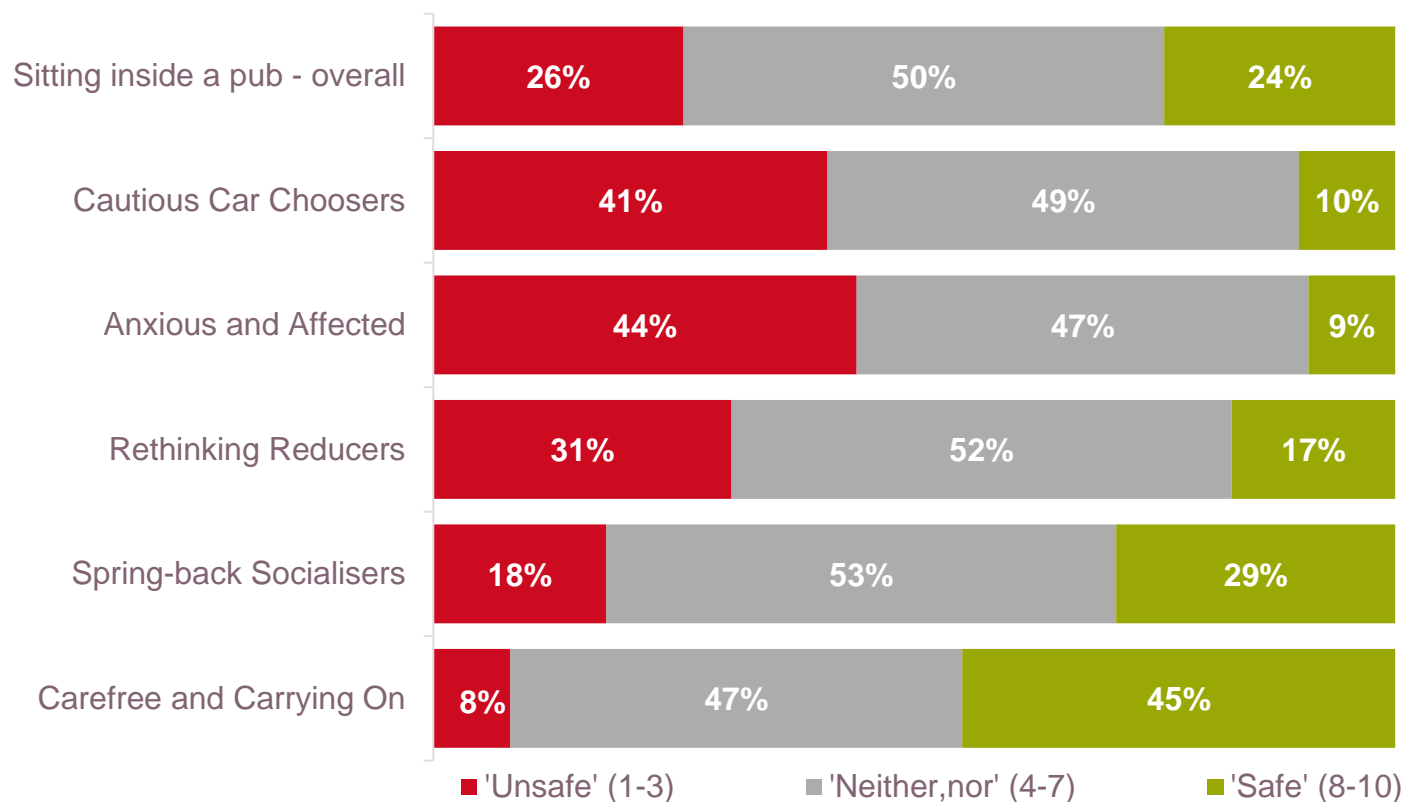
Base: W45 1,992



Spring-back Socialisers and those who are Carefree and Carrying On are more likely than others to rate sitting inside a pub as 'safe'

Specifically in relation to coronavirus, on a scale of 1 to 10 where 1 is very unsafe and 10 is very safe, how safe do you consider the following activities? Sitting inside a pub (if allowed)

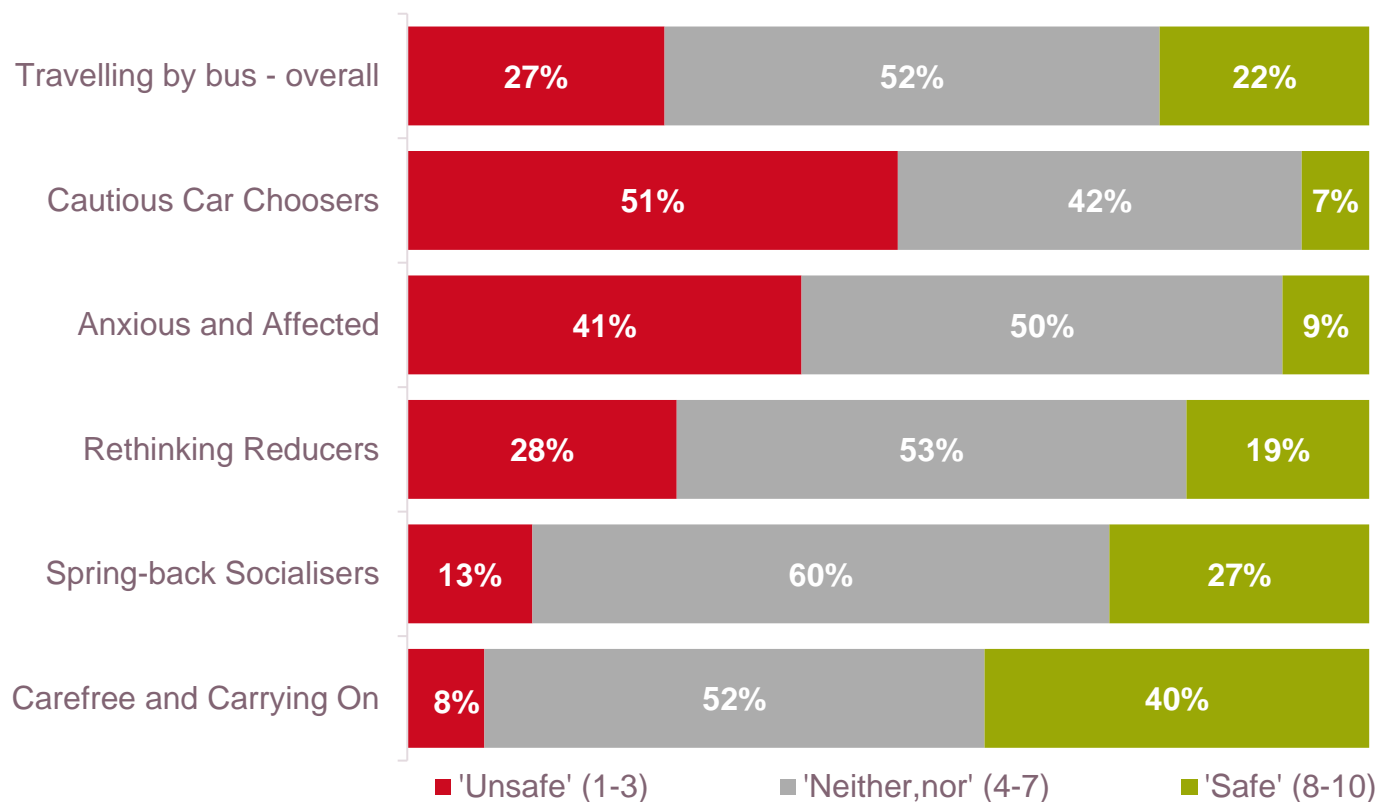
Base: W45 1,992



Spring-back Socialisers and those who are Carefree and Carrying On are more likely than others to rate travelling by bus as 'safe'

Specifically in relation to coronavirus, on a scale of 1 to 10 where 1 is very unsafe and 10 is very safe, how safe do you consider the following activities? Travelling by bus

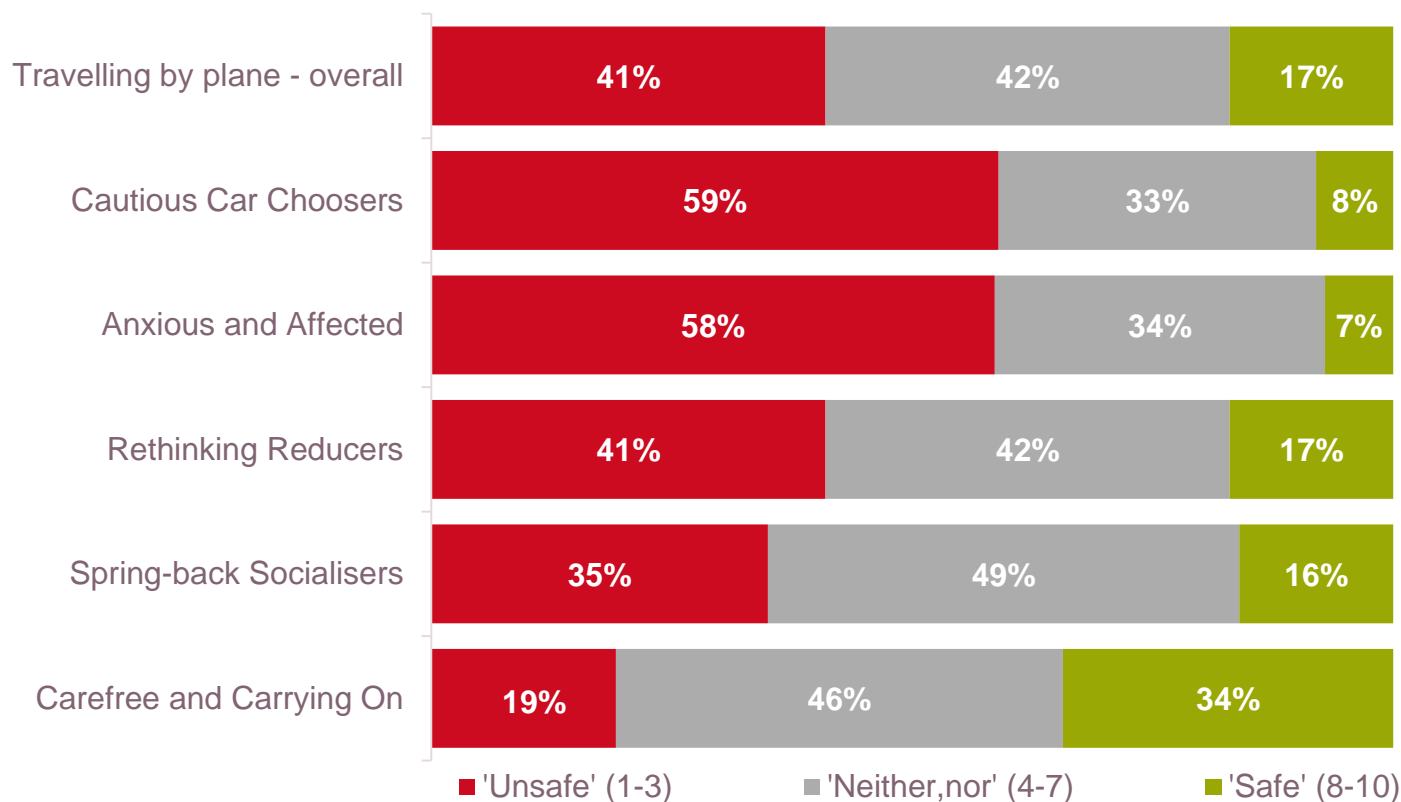
Base: W45 1,992



Those who are Carefree and Carrying On are more likely than others to rate travelling by plane as 'safe'

Specifically in relation to coronavirus, on a scale of 1 to 10 where 1 is very unsafe and 10 is very safe, how safe do you consider the following activities? Travelling by plane

Base: W45 1,992





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.

Methodology and sample breakdown – week 45

The data contained in this report is collected as part of the Transport Focus ‘Travel during Covid-19’ omnibus survey. Fieldwork is undertaken by Yonder Consulting each weekend.

For more information on how the segmentation has been developed, and for more details on the profile of the segments themselves, please refer to the Yonder report which is available [here](#).

Sample size by segment

	Total	Cautious Car Choosers	Anxious and Affected	Rethinking Reducers	Spring-back Socialisers	Carefree and Carrying On	Unsegmented
Wave 45	2,016	499	279	169	483	522	64

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.