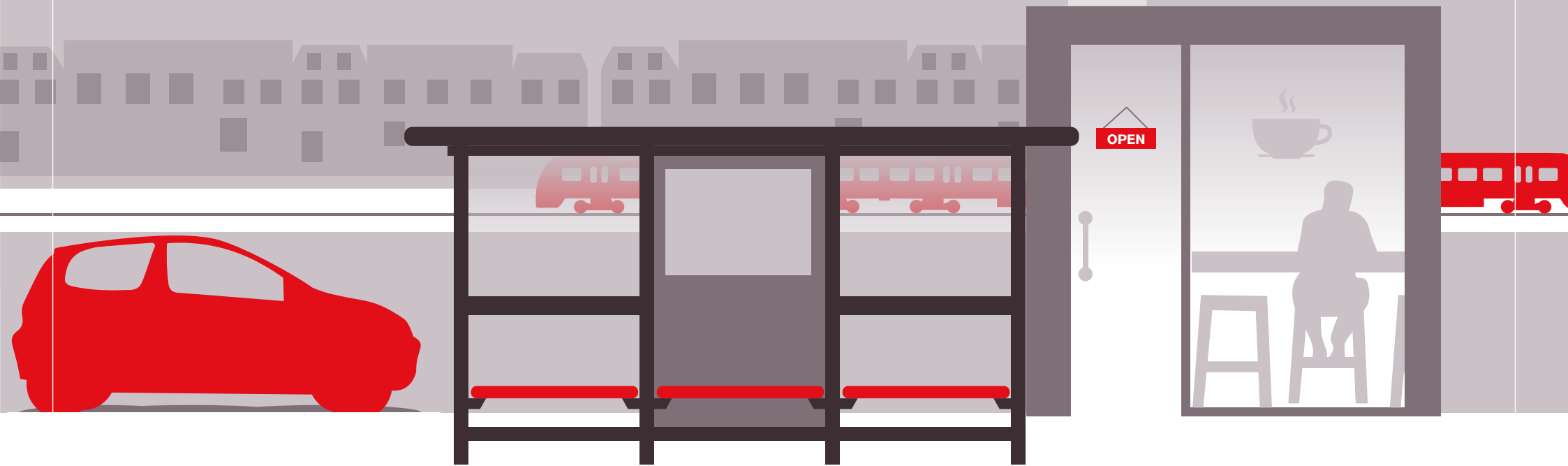


Covid-19 travel segmentation

7 - 23 May 2021 analysis



Springing back?

This latest report shows how our five segments are feeling about public transport and Covid-19 following the significant changes in May to unlock more of the economy and allow more indoor activities. More information on each segment is available on page 17.

Given the change in restrictions, and therefore more reasons for people to travel, it could be surprising that many of the attitudes of our segments have remained fairly consistent. You might guess that perhaps the new variant of Covid-19 originally identified in India is acting as a drag on changes in attitudes, or even speculate the poor weather many of us experienced put a dampener on how people were feeling. More likely is simply that we have been living with Covid-19 – and for many the worry and uncertainty – for so long now any changes in attitudes may continue to be faltering and incremental.

Despite this, we can see in the report that some segments are becoming more confident and returning to public transport. Our main [Travel During Covid-19](#) report shows for both rail and bus more than half of non-users now say they would feel safe to travel – a symbolic staging post in our progress back to normality. Looking at the long-term trends we can see the Spring-back Socialisers in particular have grown in confidence, with three in four now saying they would feel safe on a train and more than two in three on a bus. They have continued to narrow the gap on Carefree and Carrying On as restrictions have eased.

Springing back? (2)

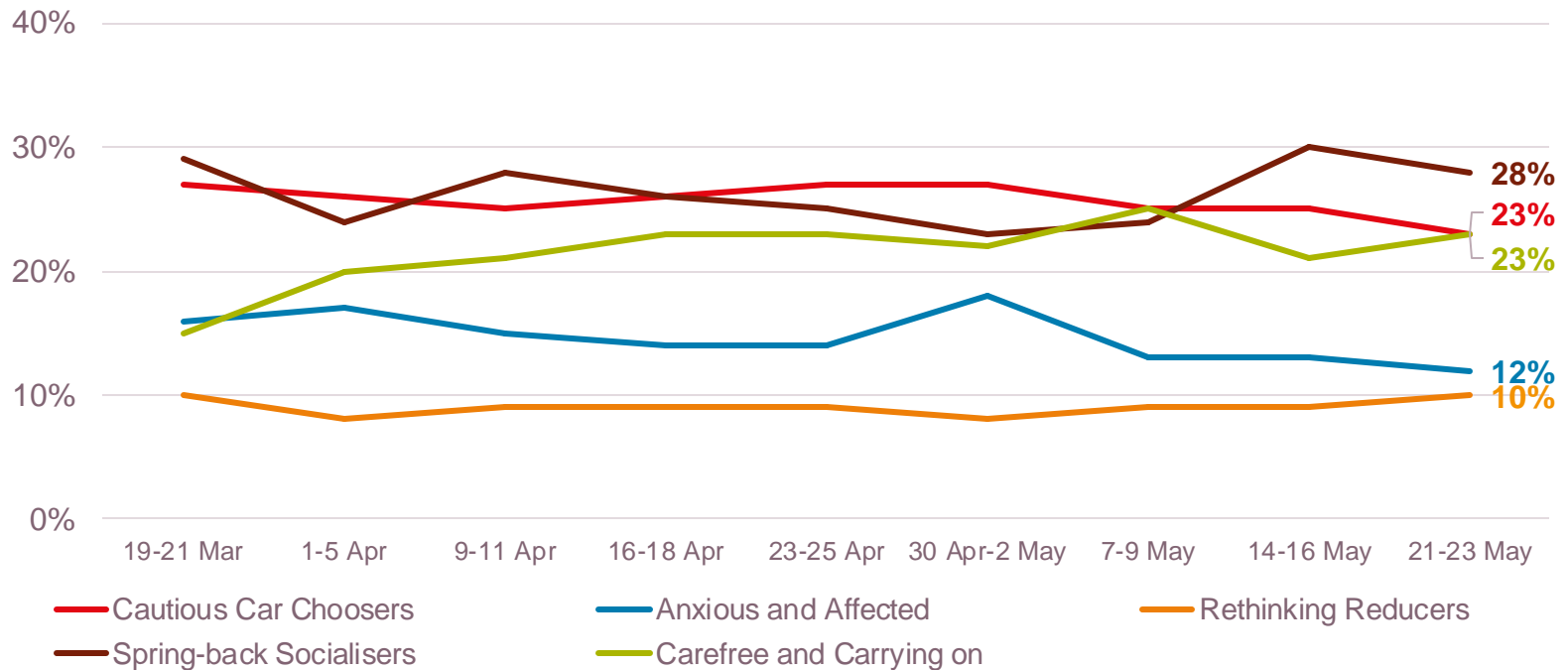
The Anxious and Affected and the Rethinking and Reducing segments remain the segments to watch most closely – they are key users and potential users of public transport where there is the greatest immediate need to rebuild confidence. Perhaps most encouraging in this report is the changes seen in the Anxious and Affected segment, with a reduction in the proportion saying ‘I won’t use public transport unless social distancing is in place’.

It is striking, that with a potential further (and perhaps even final) relaxation of restrictions a matter of weeks away, the Carefree and Carrying On remain the only segment where less than half agree social distancing is essential for them to use public transport. As we continue to track attitudes throughout June we will be closely watching how news of potential changes to restrictions affect the segments.

The size of the segments changes 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.

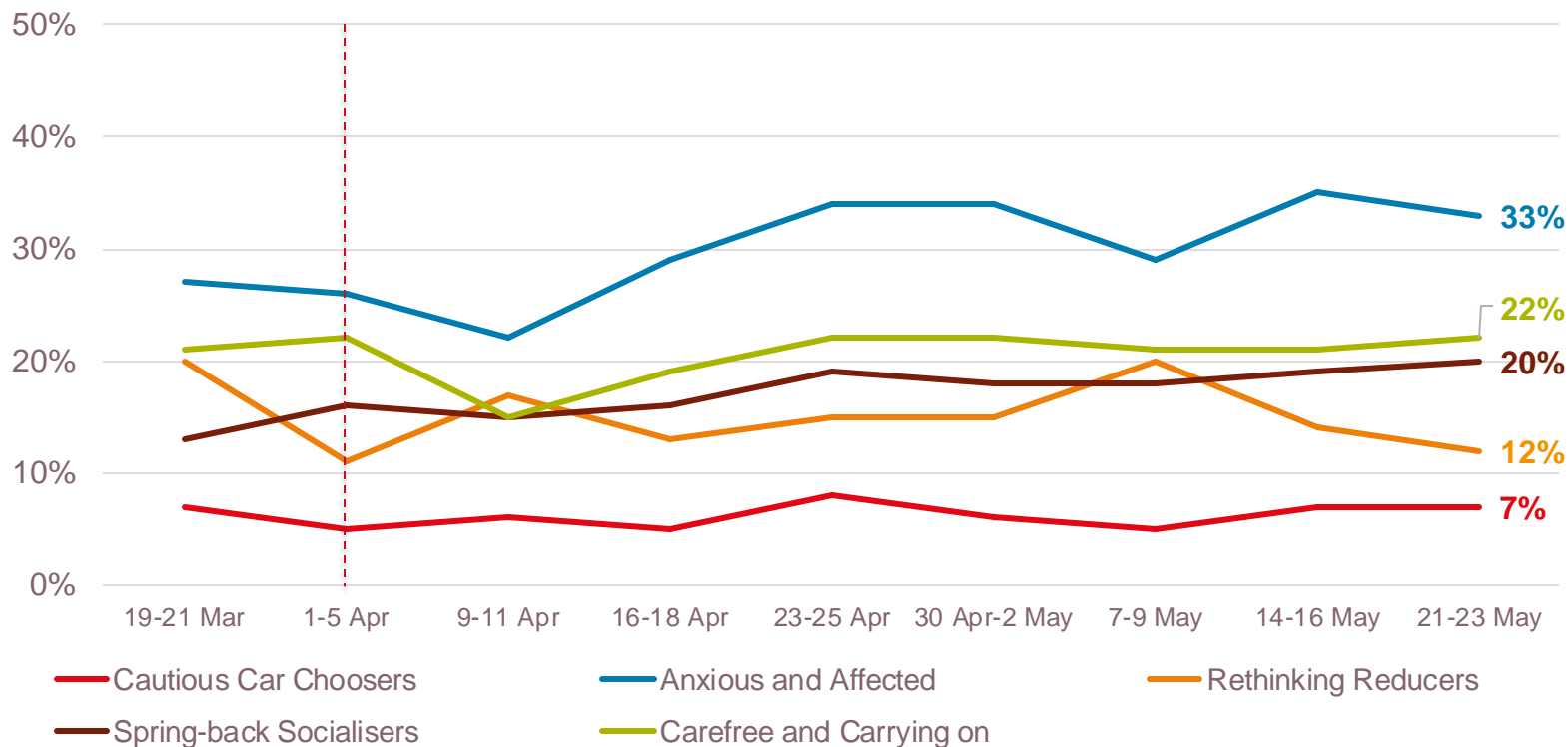
Segment size*



*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. The proportion of Rethinking Reducers who have used public transport has decreased recently.

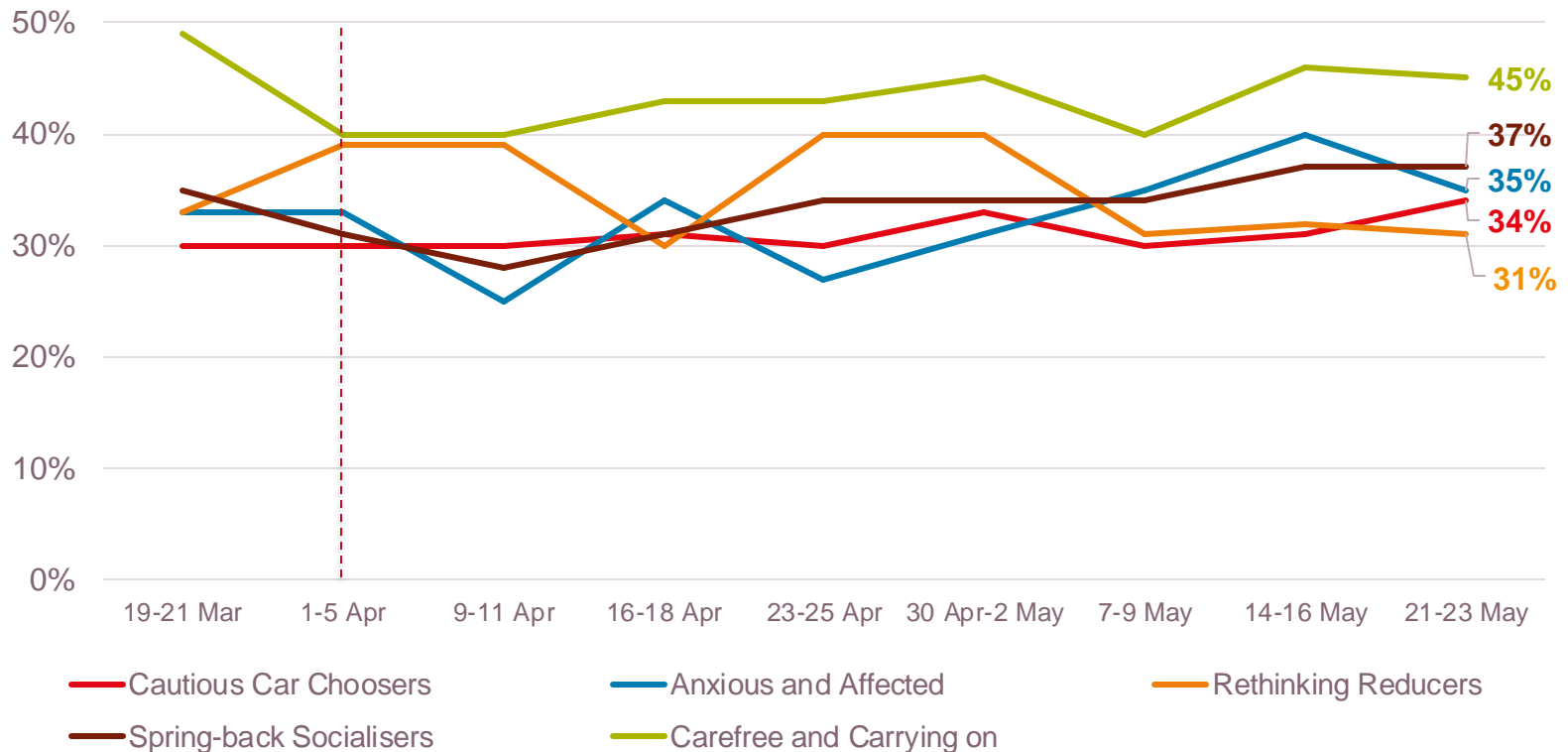
Use of public transport in the last seven days



----- 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

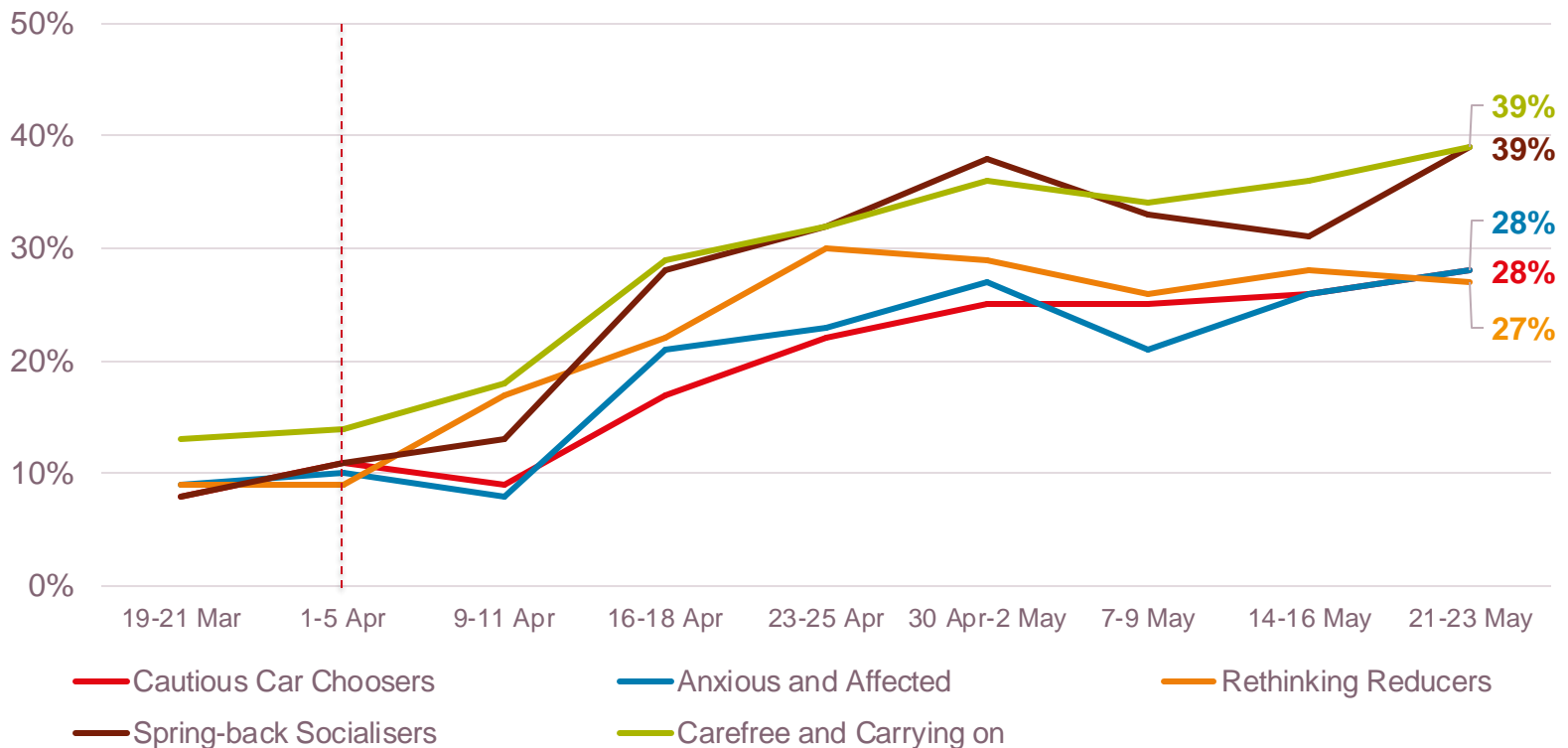
Journeys made to or from work (by any mode of transport)



--- 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

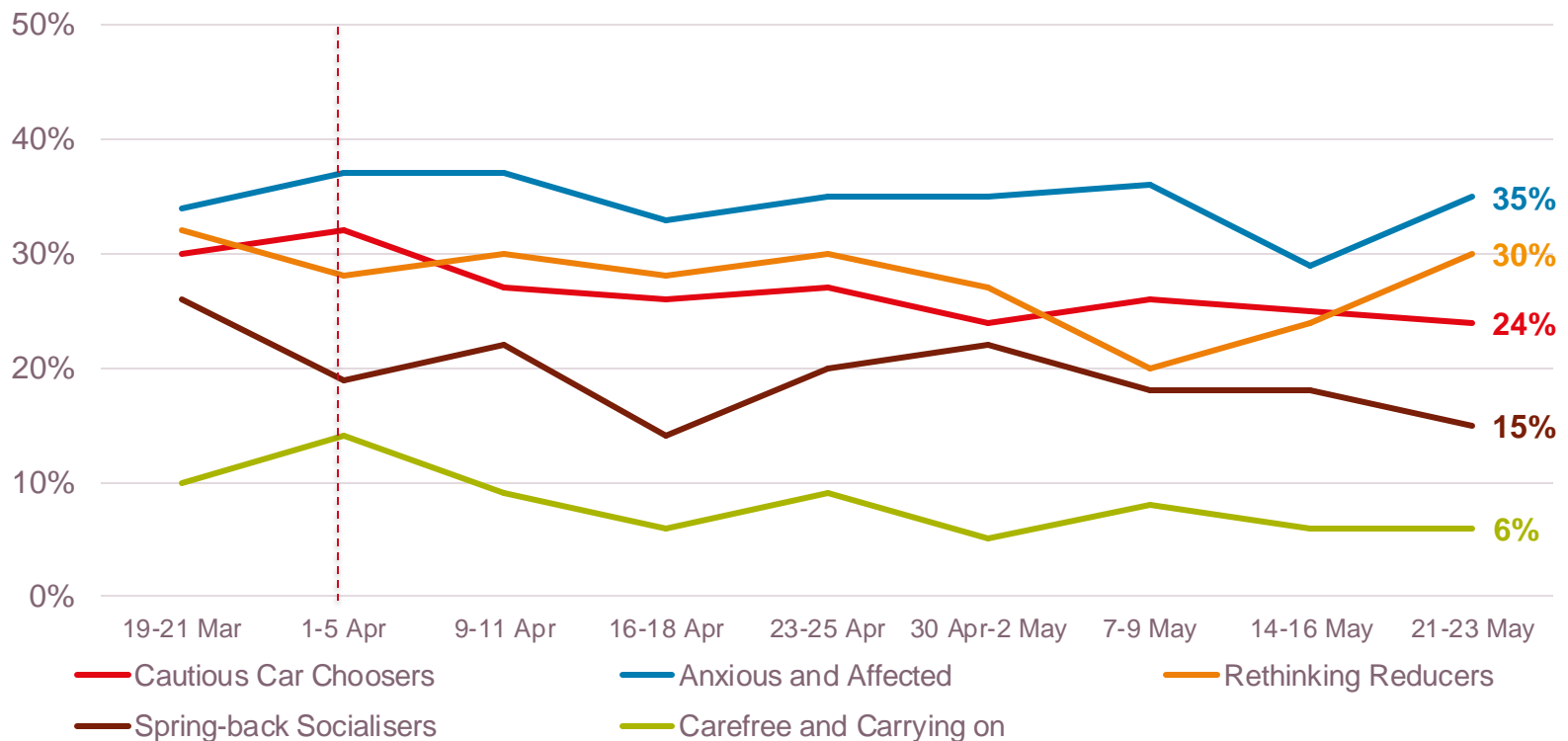
Journeys made for other leisure reasons (by any mode of transport)



----- 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. Increasing proportions of Rethinking Reducers are avoiding public transport.

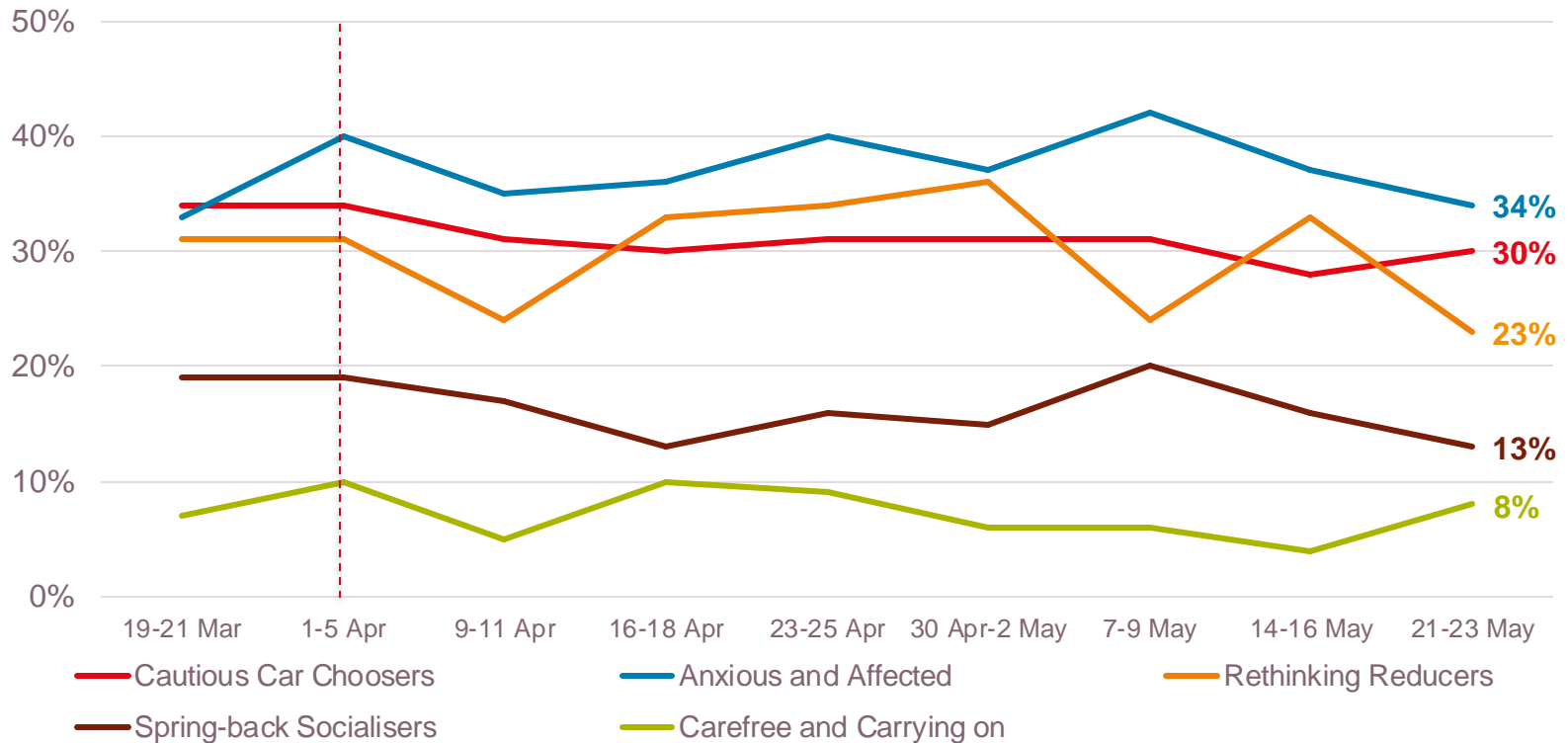
Proportions avoiding using public transport



--- 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. The proportion of Rethinking Reducers who say that they feel it is not safe to use public transport has fallen recently.

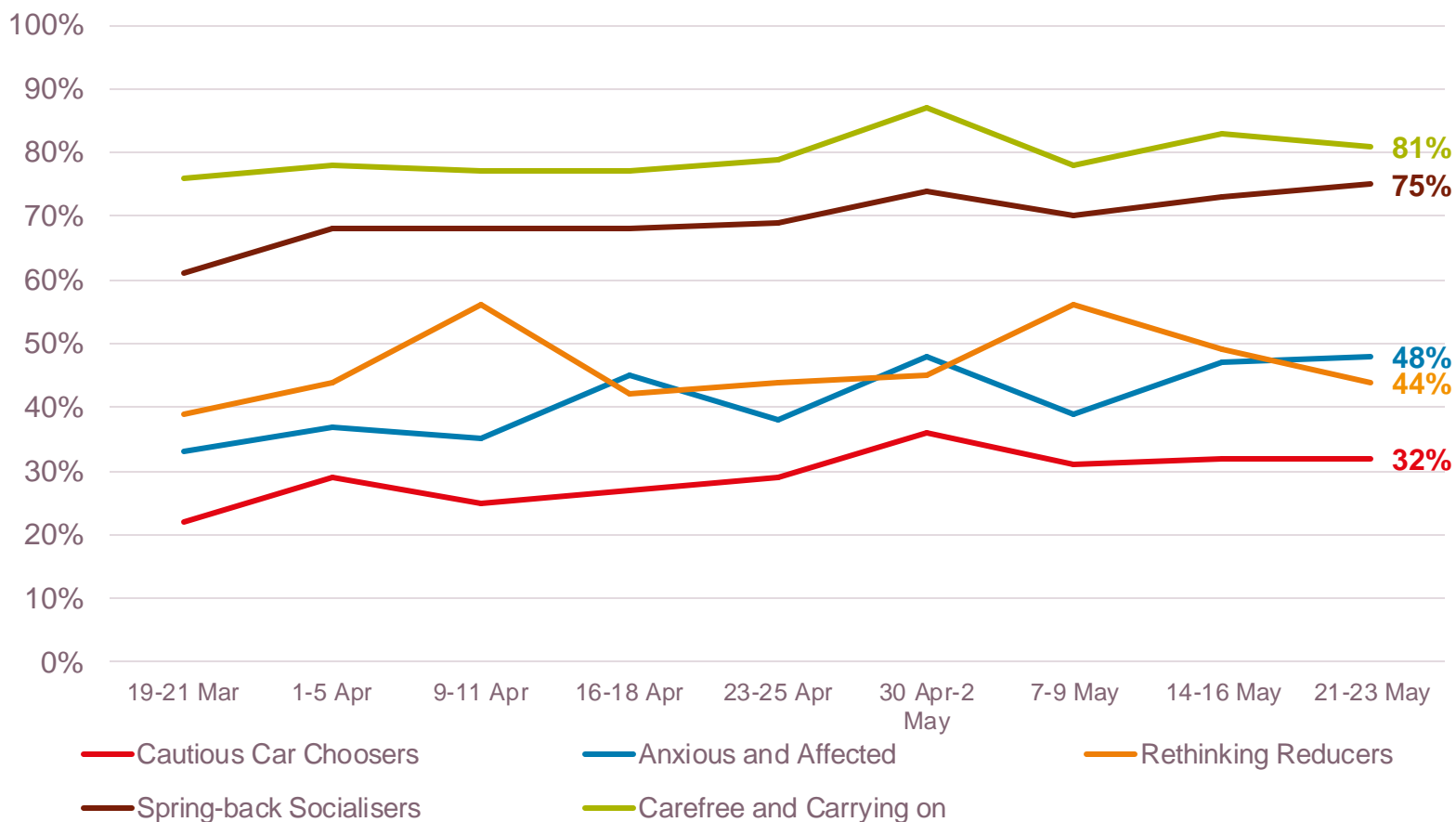
Proportions not using public transport because they feel that it is not safe to do so



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

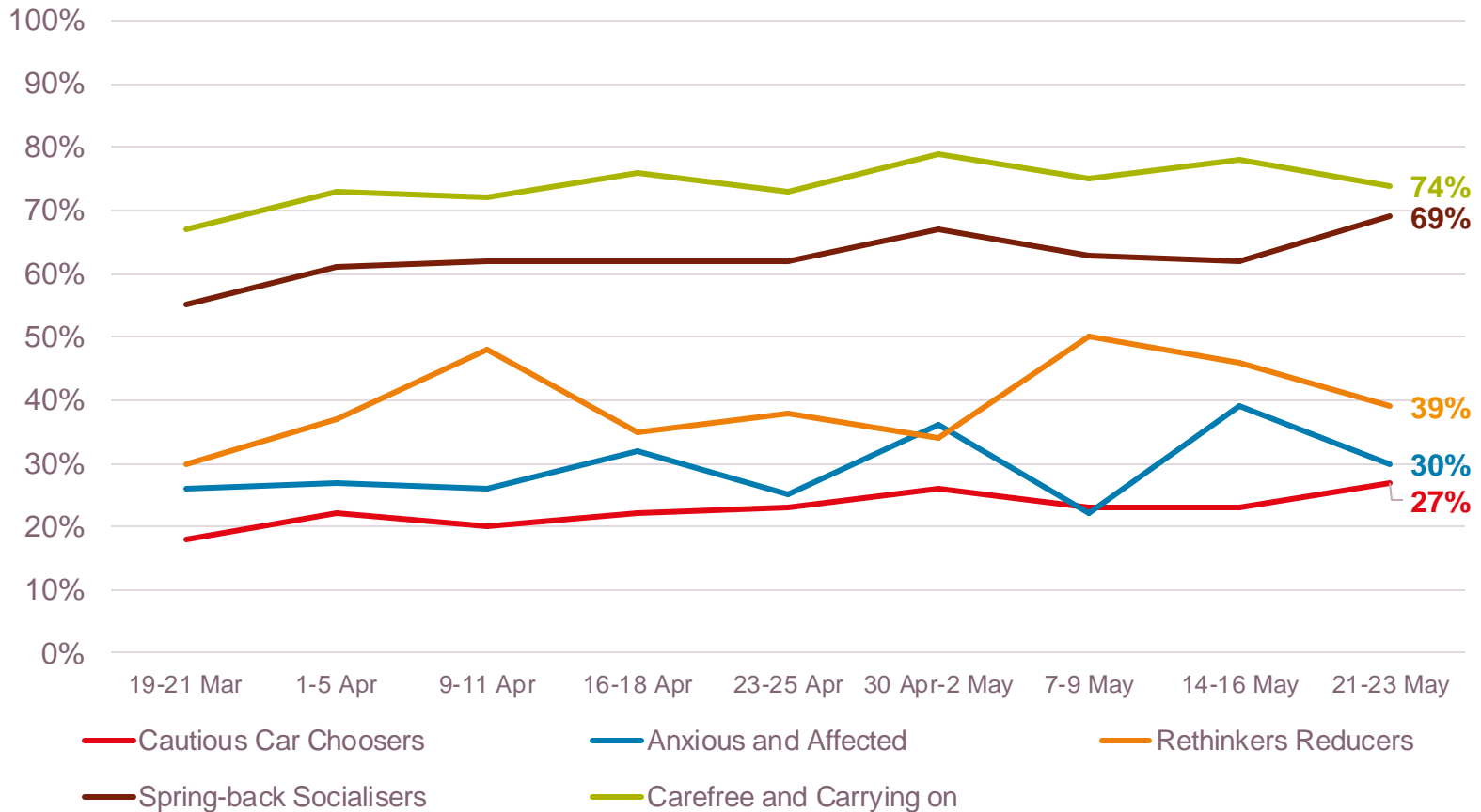
Among those who have not used a train in the last seven days, those who are in the Carefree and Carrying on segment are more likely than others to say that they would feel safe to do so. Falling proportions of Rethinking Reducers say that they would feel safe using a train.

How safe would you feel making a journey by train? (% 'safe')



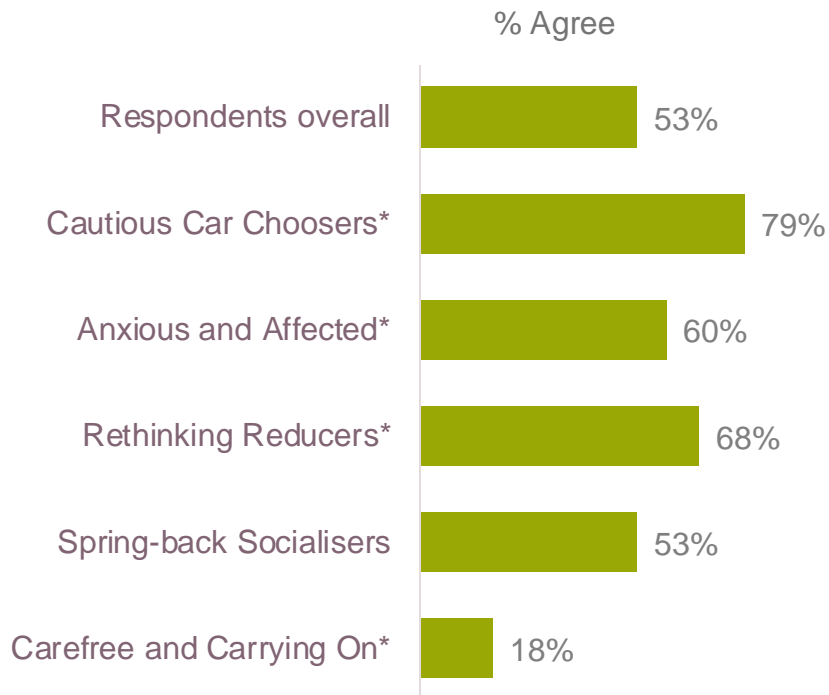
Among those who have not used a bus in the last seven days, those who are in the Carefree and Carrying on segment are again more likely than others to say that they would feel safe to do so. Falling proportions of Rethinking Reducers say that they would feel safe using a bus.

How safe would you feel making a journey by bus? (% 'safe')

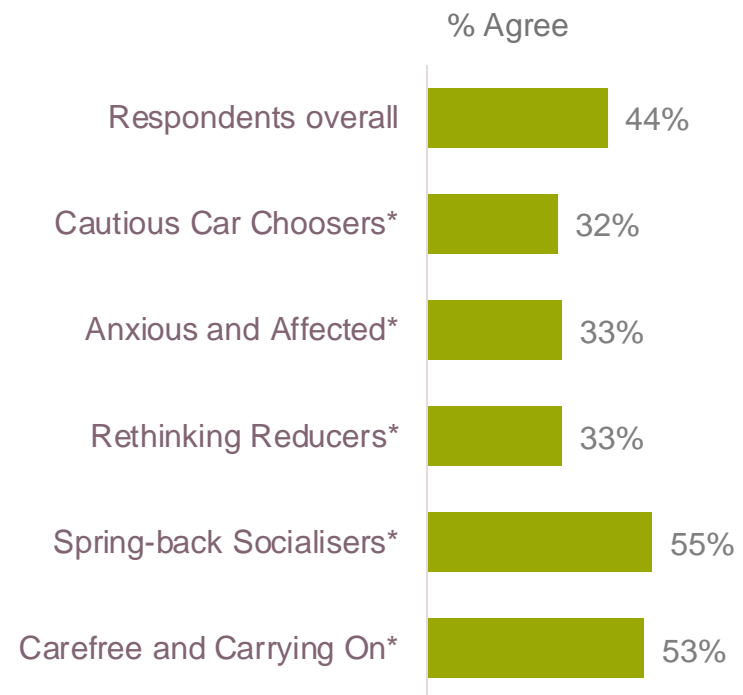


Among those to whom the question is applicable, those in the Cautious Car Choosers segment are most likely to need social distancing enforced on public transport to encourage them to use it. Those in the Carefree and Carrying on segment are generally more relaxed.

'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'

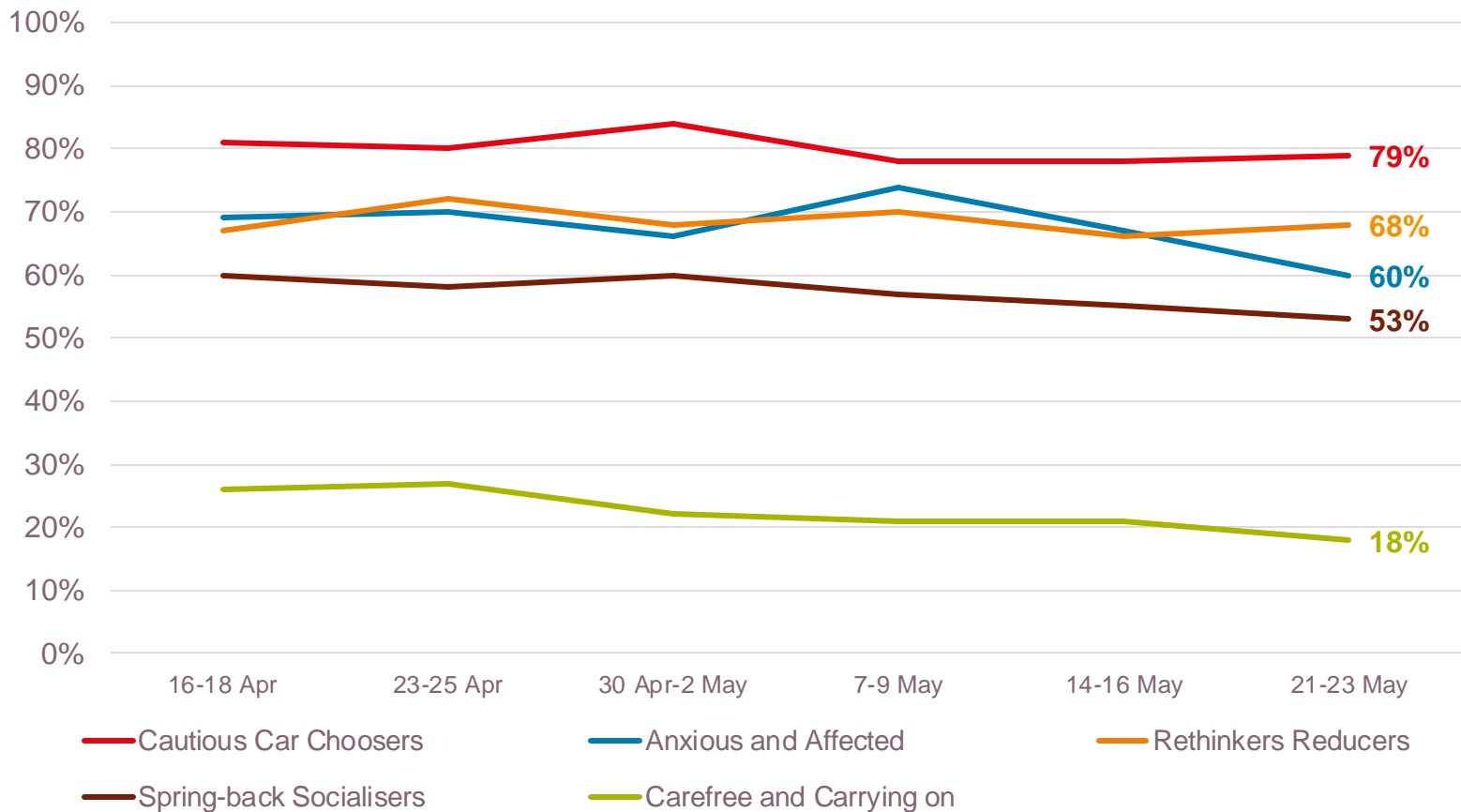


Base excludes don't know/not applicable answers

* Denotes statistically significant difference from respondents overall

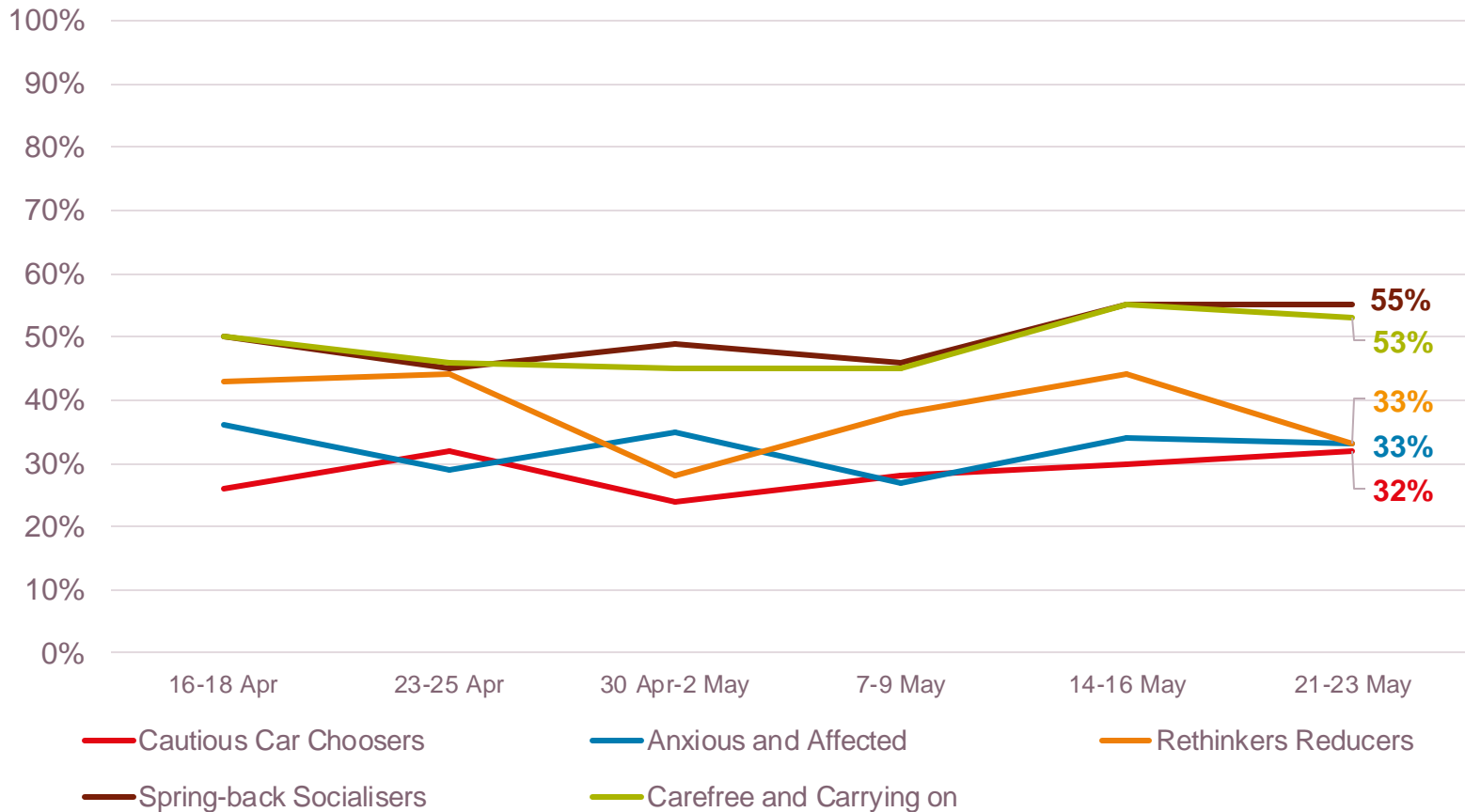
Those in the Cautious Car Choosers segment are more likely than others to agree that they won't use public transport unless social distancing is in place. Those who are 'Carefree and Carrying On' are much less likely to hold this view

'I won't use public transport unless social distancing is in place' (% 'agree')



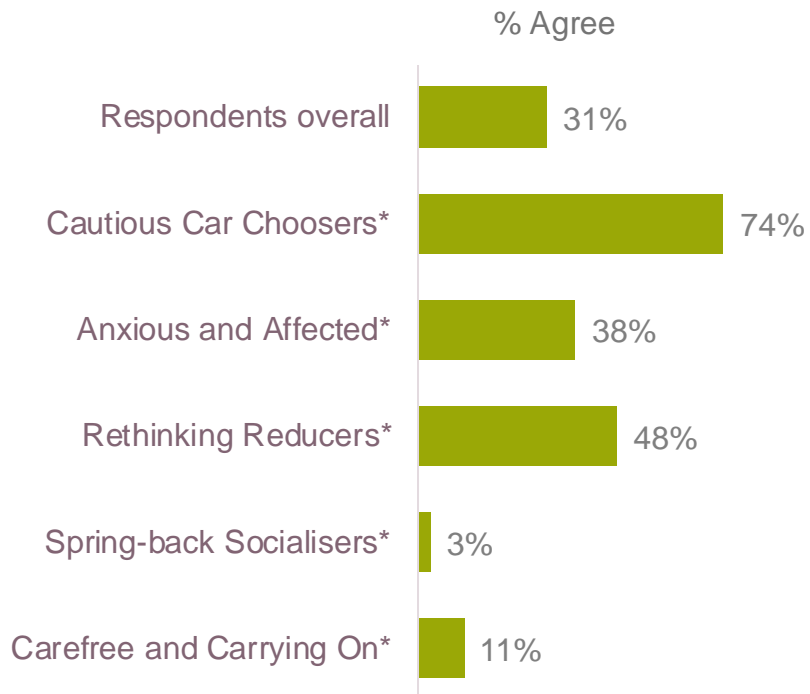
Spring-back Socialisers and those who are Carefree and Carrying On are more likely than others to agree that as long as passengers are wearing face coverings, relaxing the social distancing on public transport makes sense to them.

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

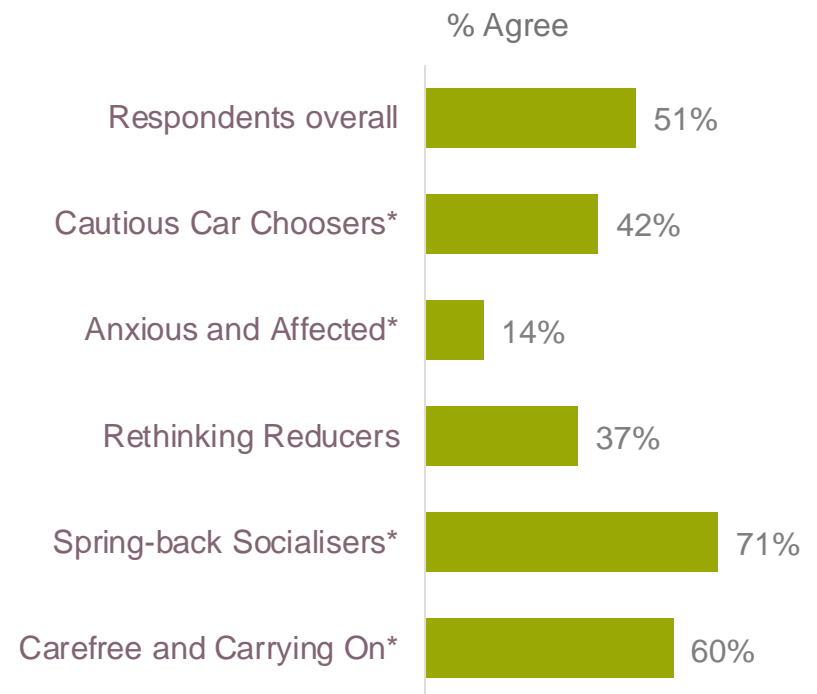


Those in the Cautious Car Choosers segment are also more likely than others to say that they will never again feel completely comfortable on public transport. Those in the Anxious and Affected segment are least likely to feel that enough is being done to ensure coronavirus safety.

‘I will never again feel completely comfortable on public transport’



‘Enough is being done to ensure coronavirus safety on public transport’

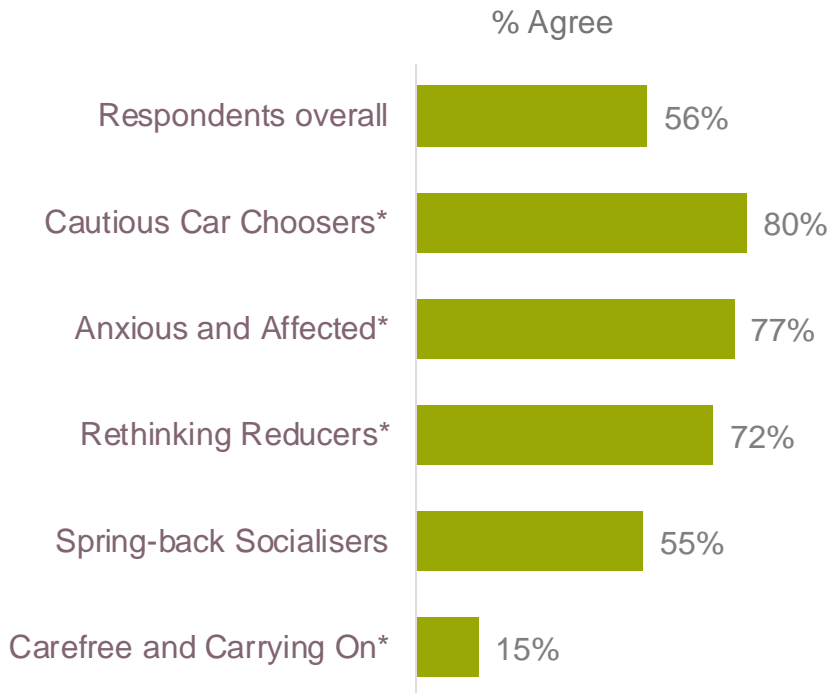


Base excludes don't know/not applicable answers

* Denotes statistically significant difference from respondents overall

Those in the Cautious Car Choosers segment are 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

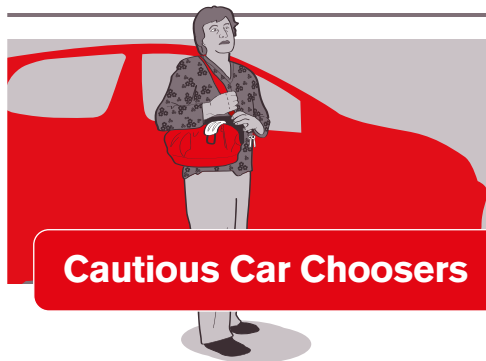
Meet our segments



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.

Methodology and sample breakdown – week 47

The data contained in this report is collected as part of the Transport Focus *Travel during Covid-19 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 47	2,032	476	249	205	567	471	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.