

Covid-19 travel segmentation

21 May - 6 June analysis

June 2021



Waiting and wondering?

This latest report shows how our five segments are feeling about public transport and Covid-19 after restrictions eased last month and before significant new announcements about the next roadmap stages. We've been tracking the segments for long enough now to begin aggregating two waves for the first time – making trends clearer and easier to follow. More information on each segment is available on page 17.

All groups have continued to travel more for leisure reasons (by any mode) and most of the segments have been using public transport more in recent weeks. The Anxious and Affected are by far the most likely to have done so, with one in three using public transport, even though one in three still say they are avoiding public transport.

The overall trends for many measures have been encouraging in recent weeks, with slow and steady positive changes in perceptions across the segments. However, a majority of each of the segments, with the notable exception of the Carefree and Carrying On, continue to say they won't use public transport unless social distancing is in place.

This time we've asked the segments more questions about face coverings too. Again, the Carefree and Carrying On are the exception, with just three in 10 saying they won't use public transport unless face coverings are required too, while a clear majority of all the other segments say the same. The recent announcement of delays to the easing of further restrictions provides more time for these attitudes to soften.

Waiting and wondering?

Looking further ahead, we asked the segments about their use of face coverings on public transport in three months. It's clear that most people expect face coverings to be part of the experience of using public transport for some time. As ever the differences between the segments were striking. At one extreme almost six in 10 of the Anxious and Affected say they will wear a face covering at all times, even if it is not a requirement. While almost half of the Carefree and Carrying On say they will only wear a face covering if it is a requirement.

It's clear that despite growing usage there is still some way to go for attitudes to public transport. We'll continue to track the segments and will monitor how the delay to the next stages of lockdown easing affects their views.

About this report

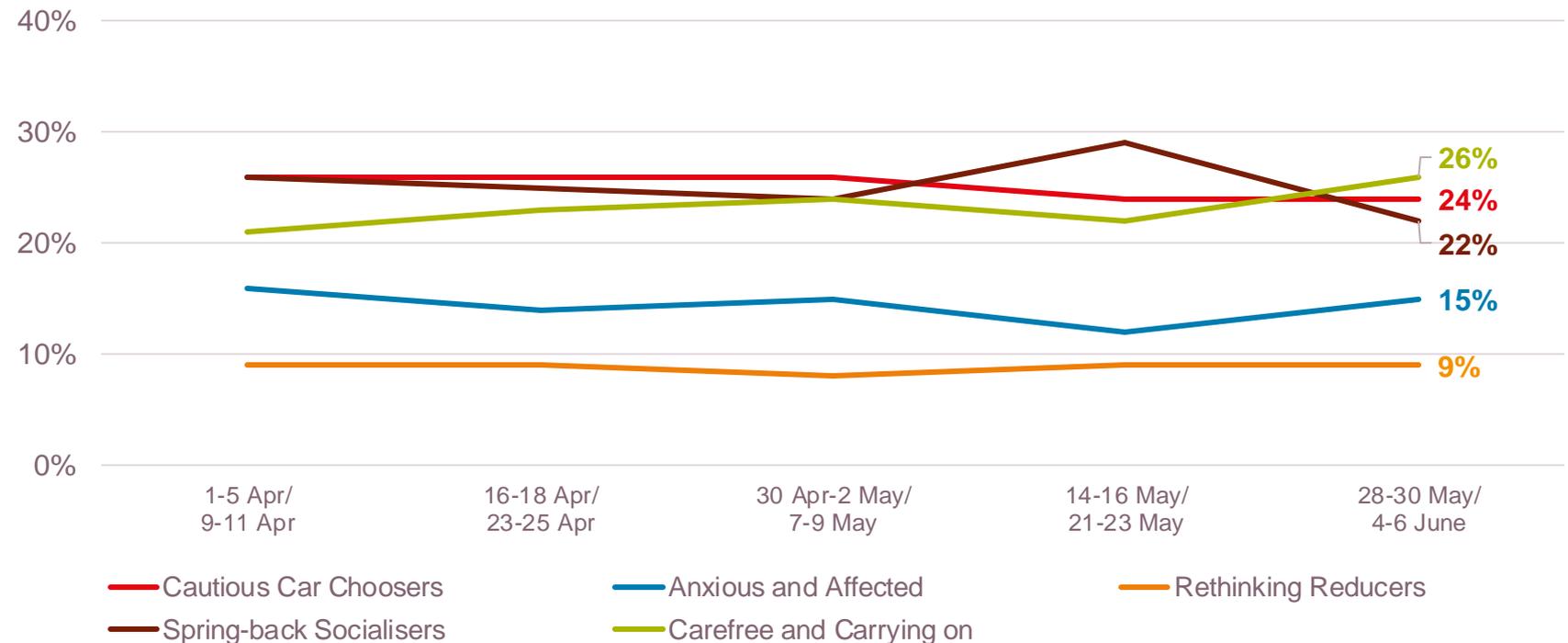
The data presented in this report aggregates two survey waves of the Transport Focus Travel during Covid-19 omnibus survey. The table below shows which survey waves are aggregated at each data point.

Fieldwork dates	Omnibus waves
1-5 April / 9-11 April	W40 + W41
16-18 April / 23-25 April	W42 + W43
30 April – 2 May / 7-9 May	W44 + W45
14-16 May / 21-23 May	W46 + W47
28-30 May / 4-6 June	W48 + W49

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.

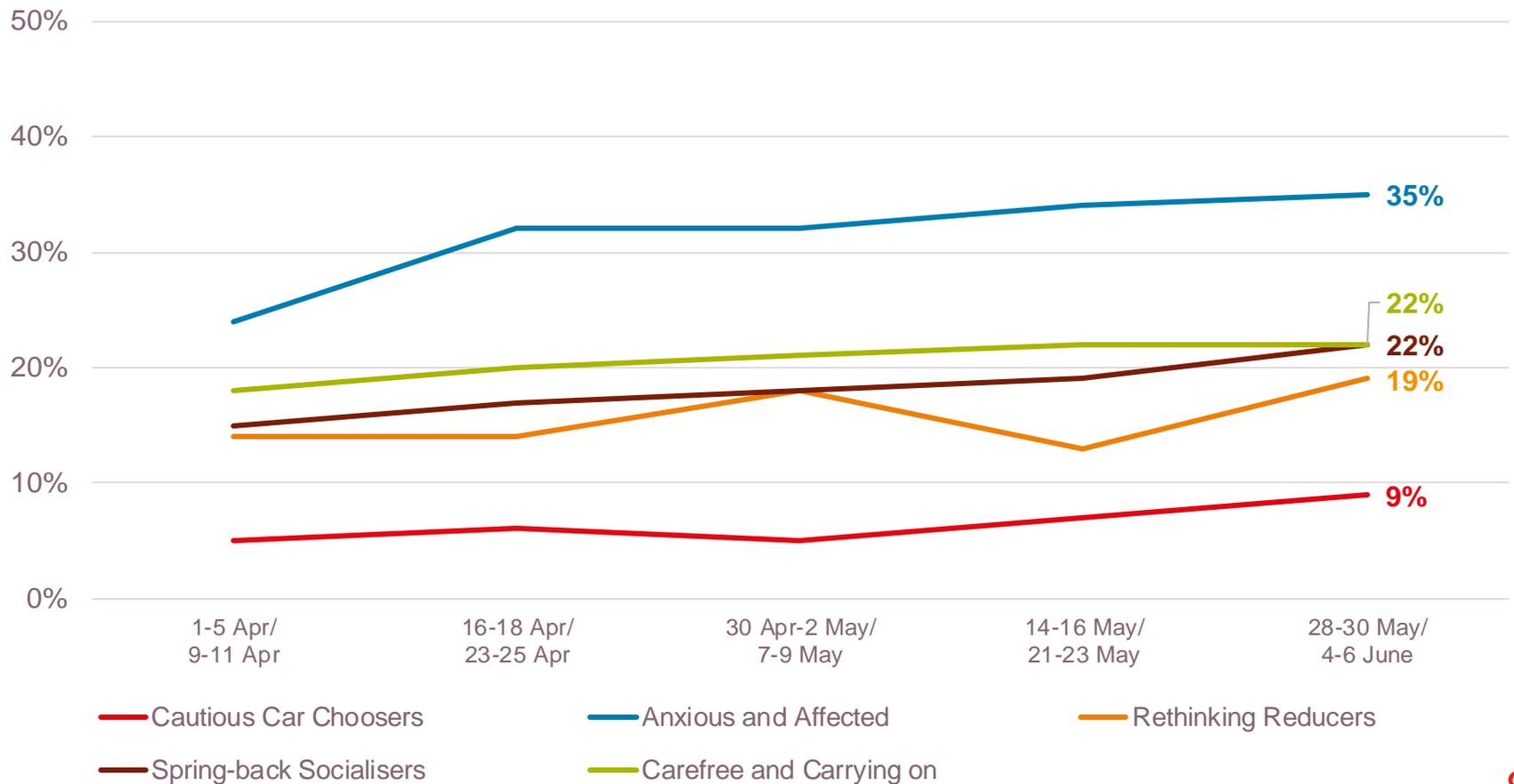
Segment size*



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

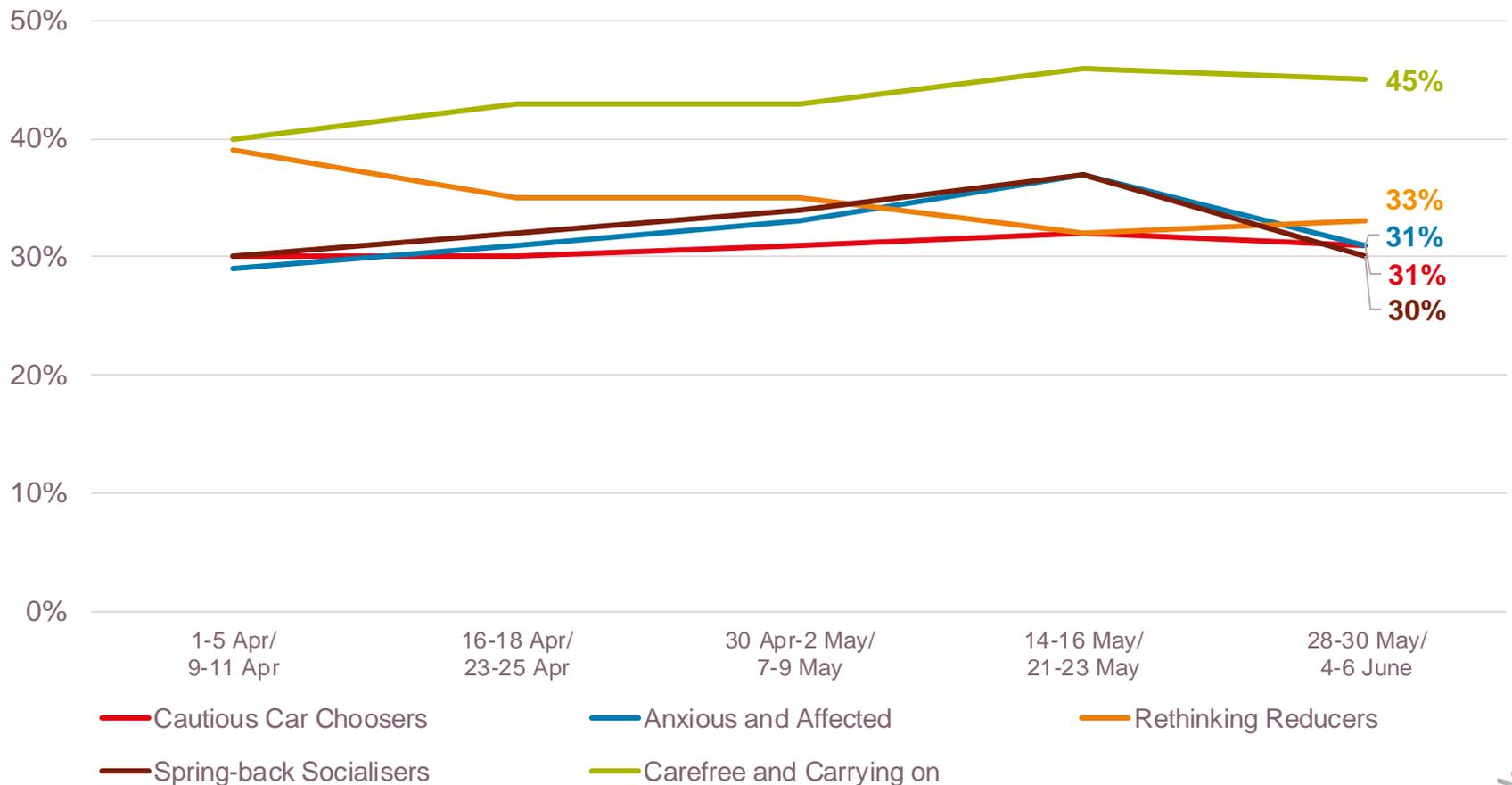
The Anxious and Affected segment are more likely than others to have used public transport in the last seven days

Use of public transport in the last seven days



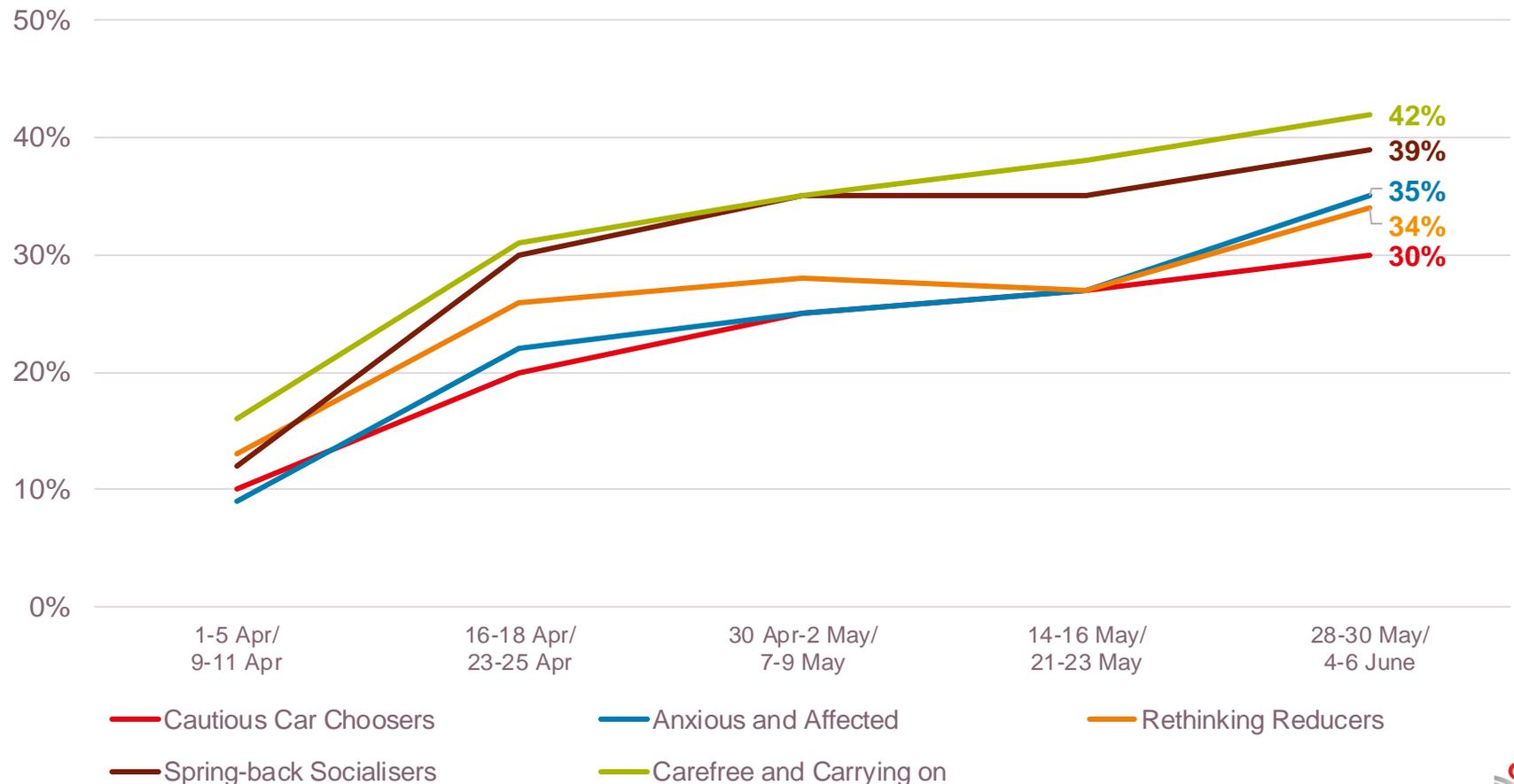
The Carefree and Carrying on segment continue to be more likely than others to be making journeys to or from work in the last seven days

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



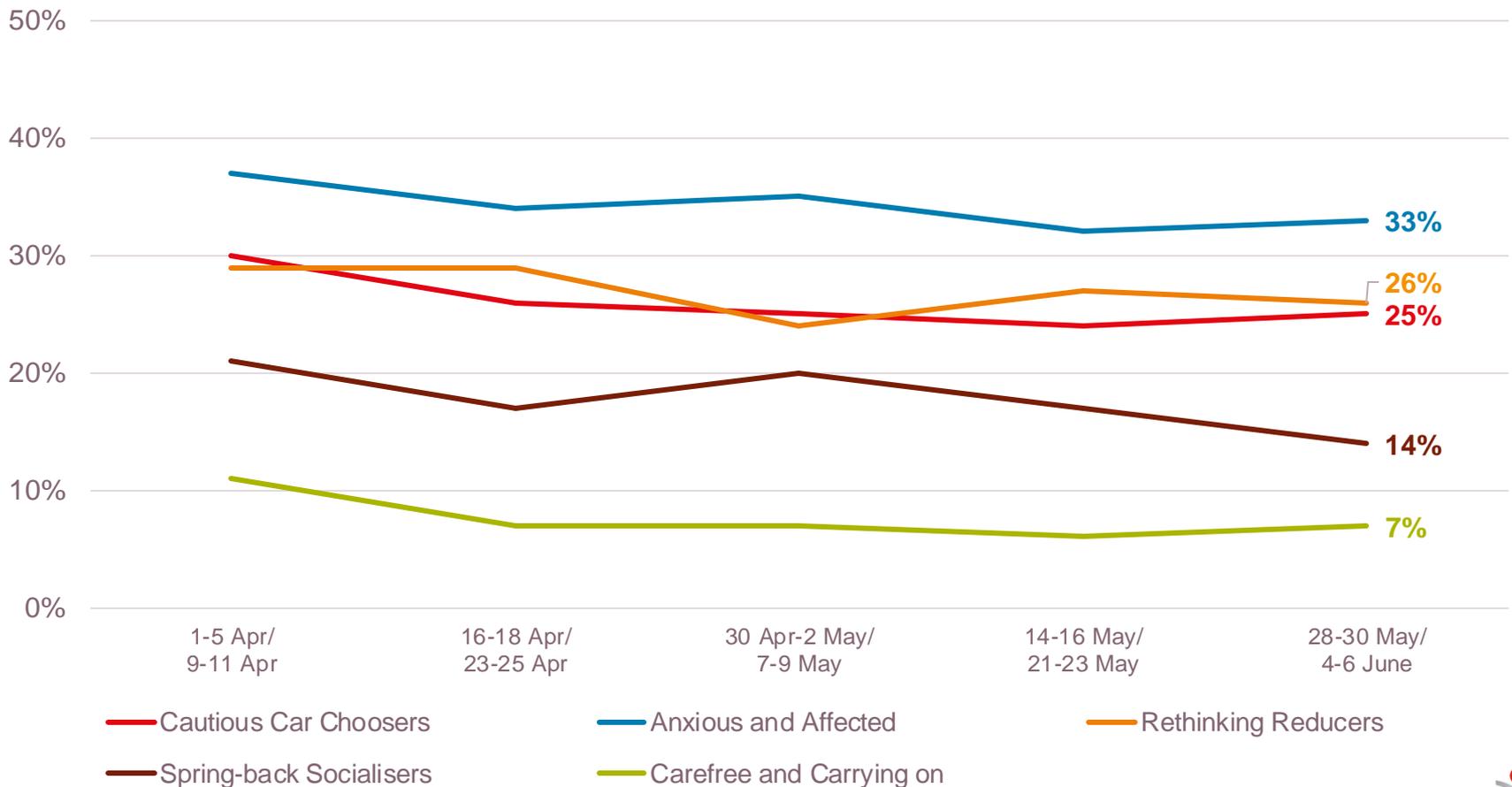
The Carefree and Carrying on segment and the Spring-back Socialisers are more likely than others to be making journeys for leisure reasons

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



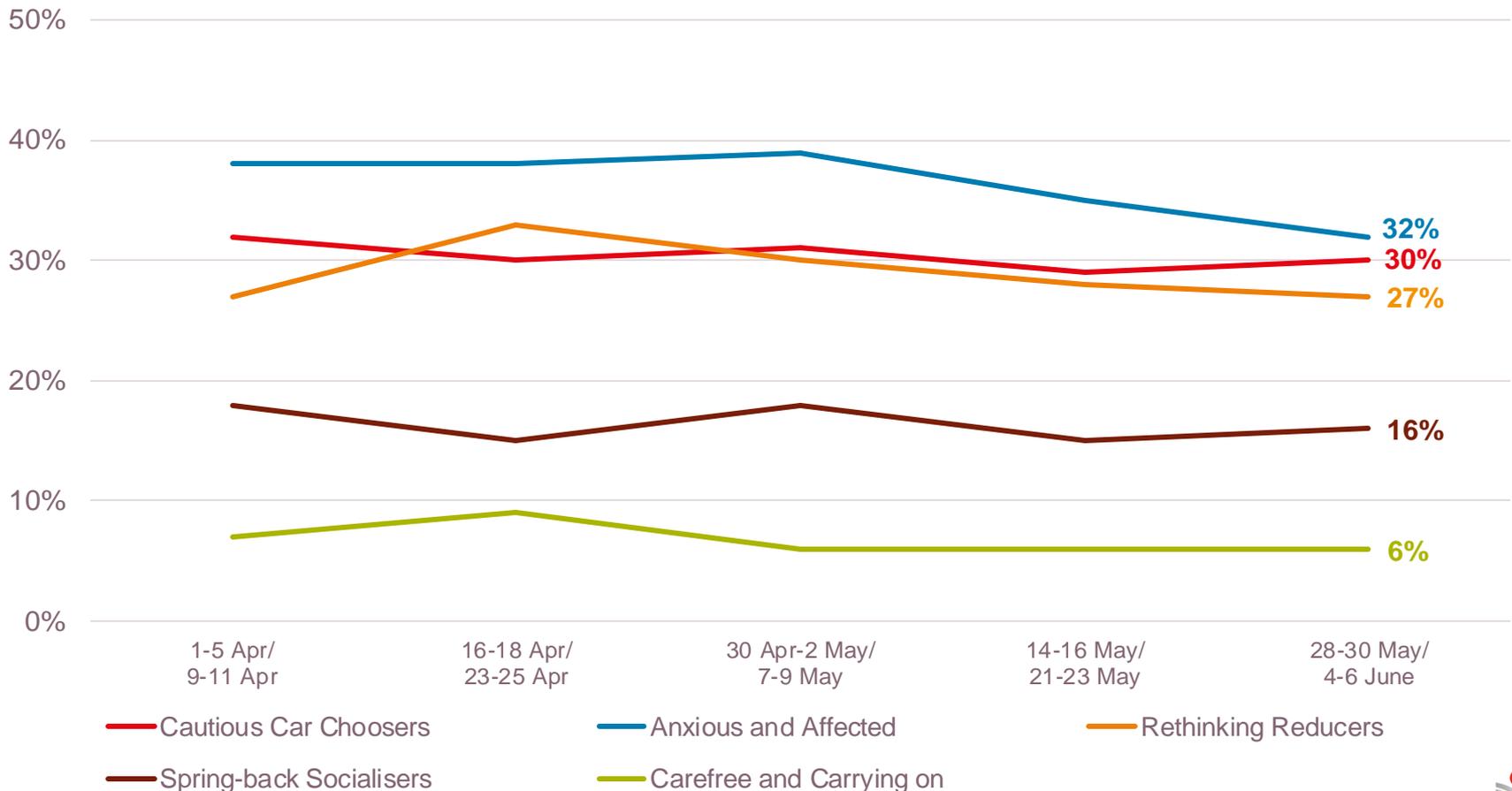
Among those not using public transport, those in the Anxious and Affected segment are more likely than others to be avoiding doing so

Proportions avoiding using public transport



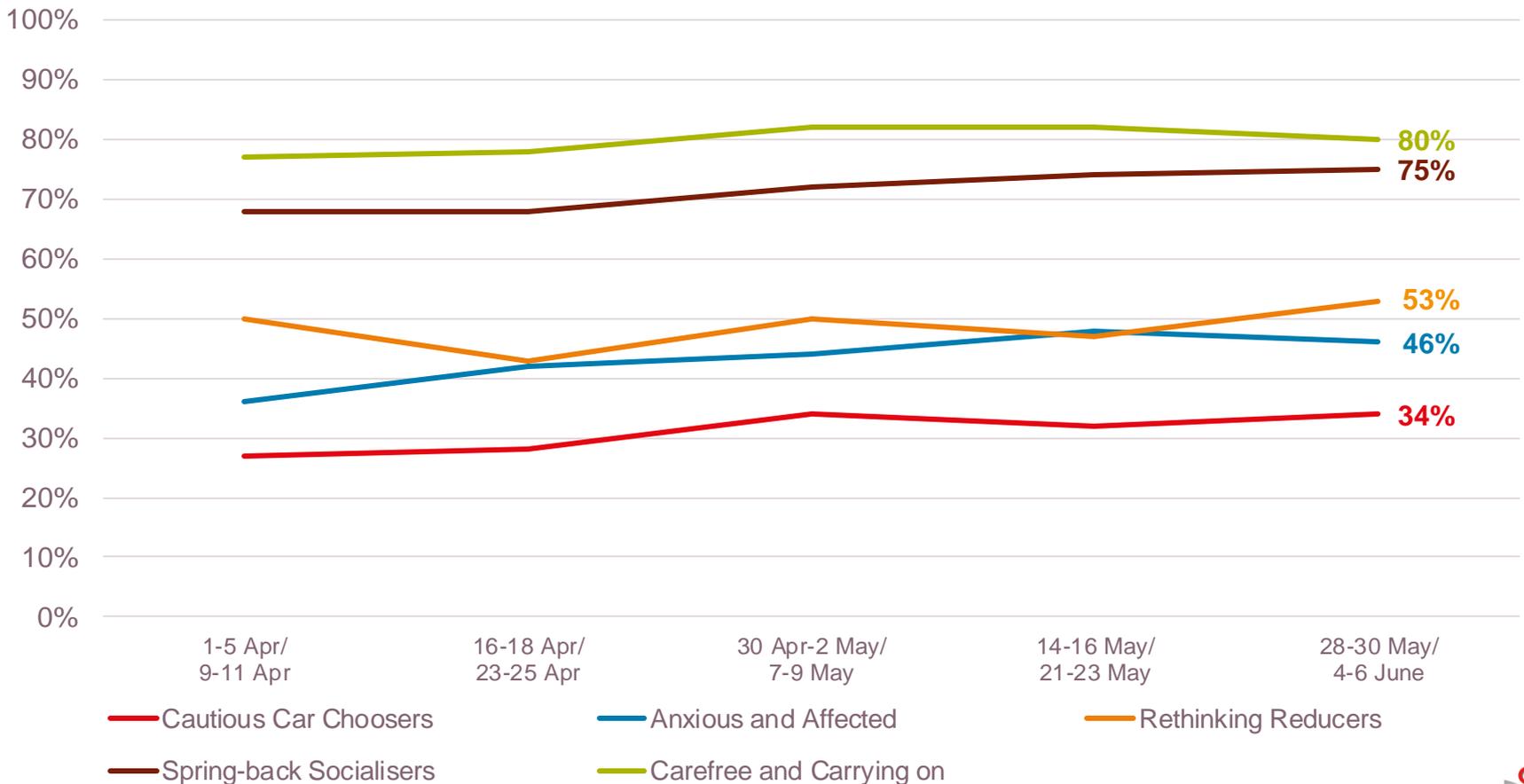
Those in the Anxious and Affected segment are also more likely than others not to be using public transport because they do not feel it is safe to do so

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



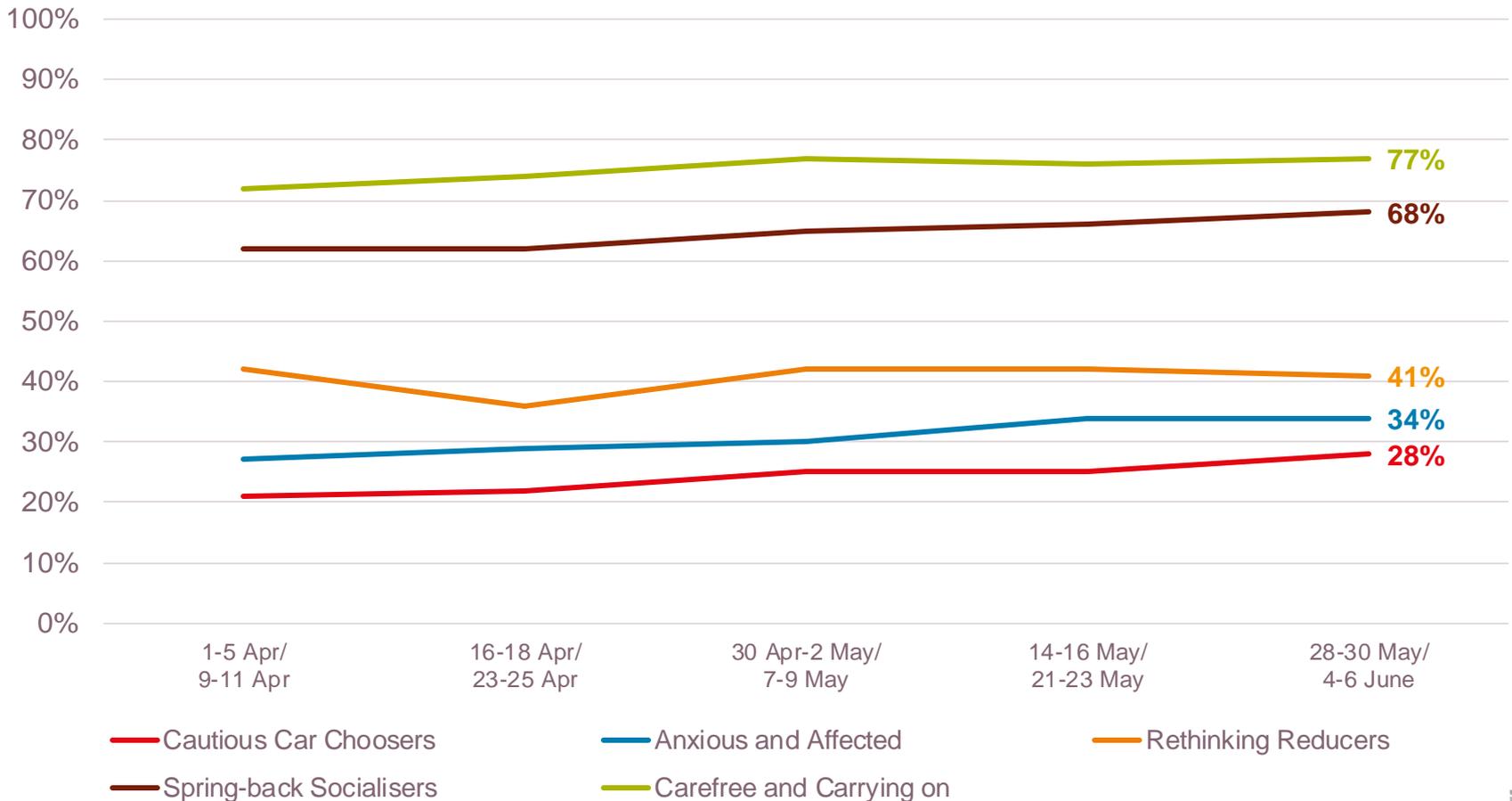
Among those who have not used a train in the last seven days, those who are in the Carefree and Carrying on segment are more likely than others to say that they would feel safe to do so

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



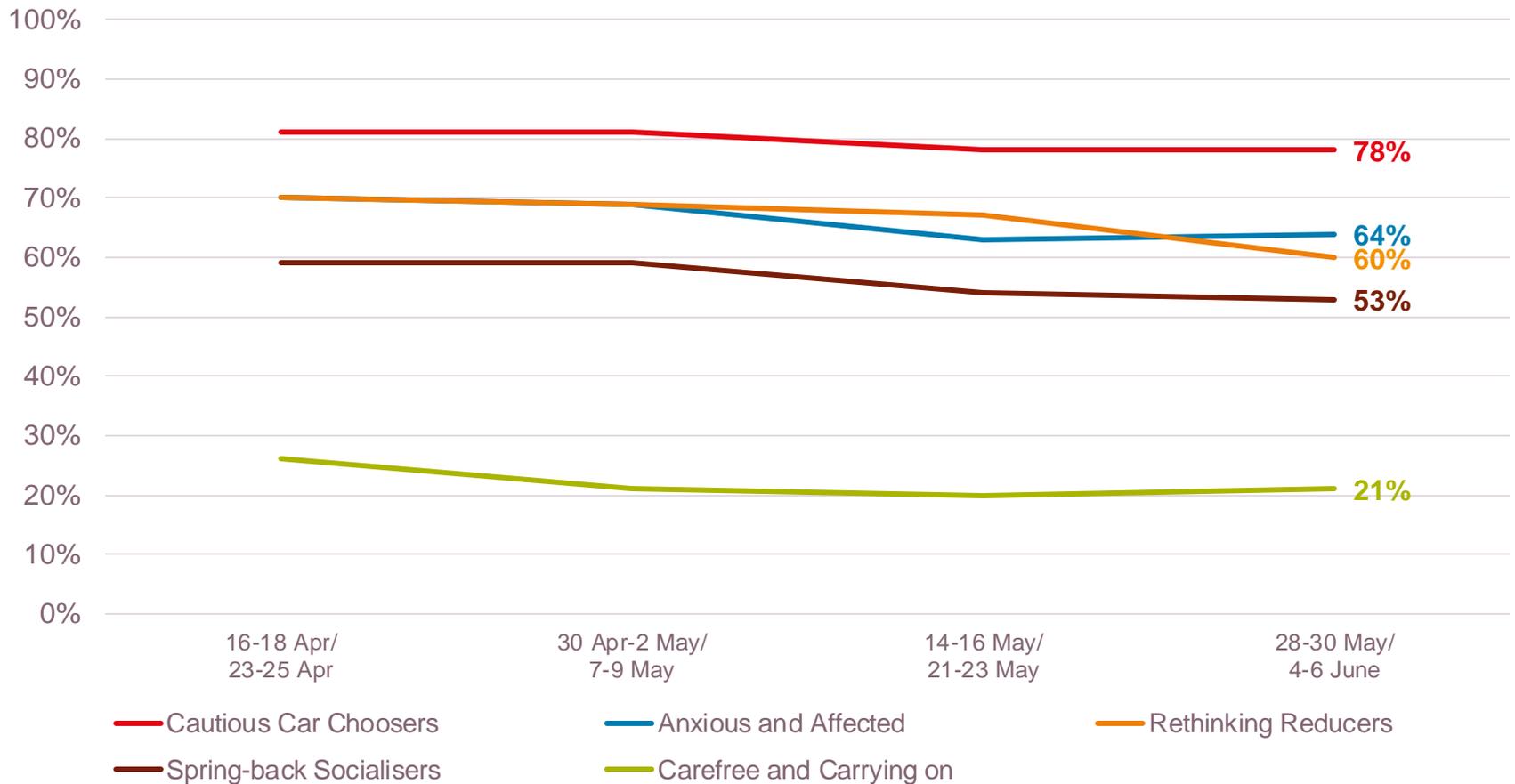
Among those who have not used a bus in the last seven days, those who are in the Carefree and Carrying on segment are again more likely than others to say that they would feel safe to do so

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



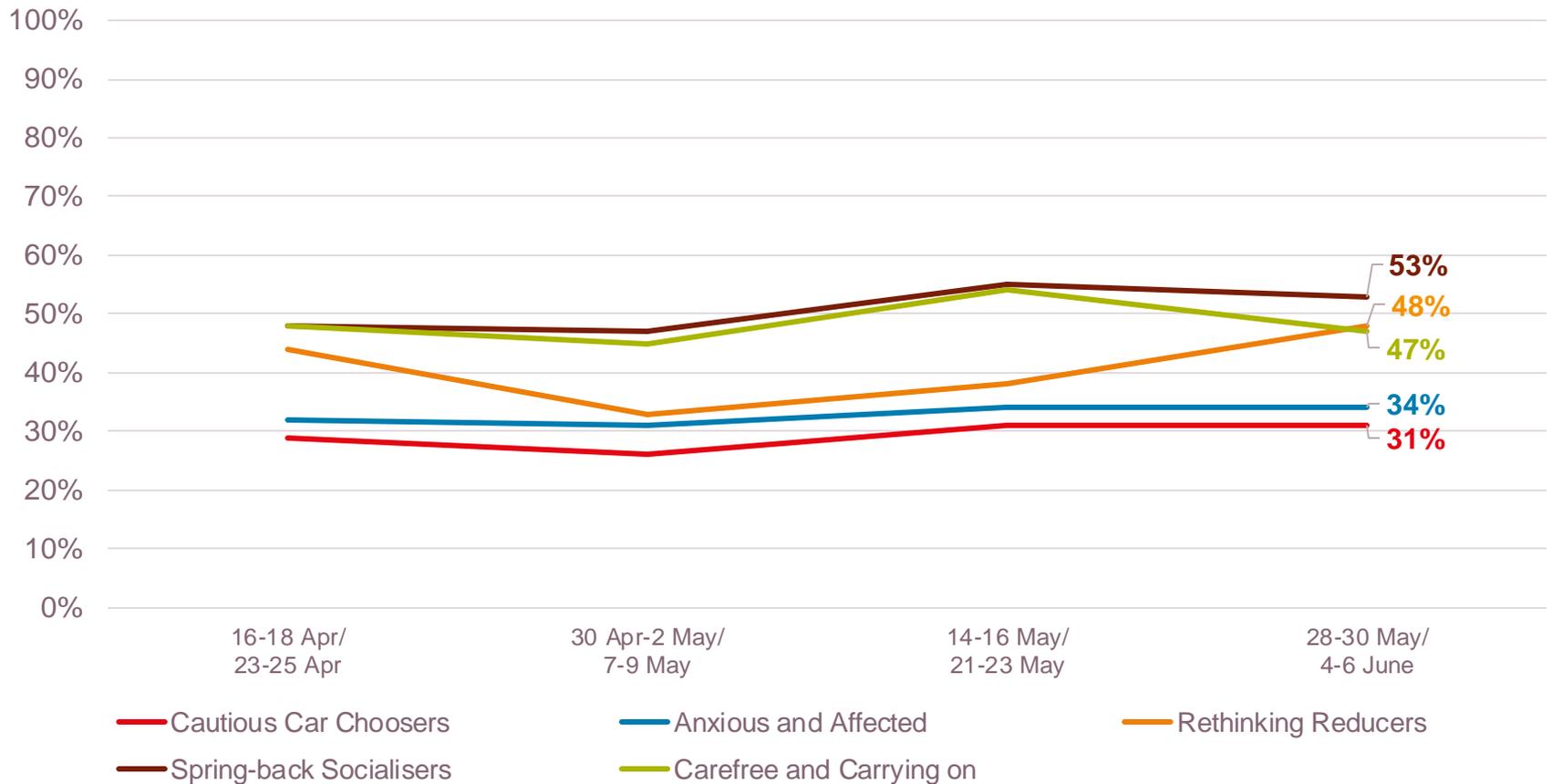
Those in the 'Cautious Car Choosers' segment are more likely than others to agree that they won't use public transport unless social distancing is in place. Those who are 'Carefree and Carrying On' are much less likely to hold this view.

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



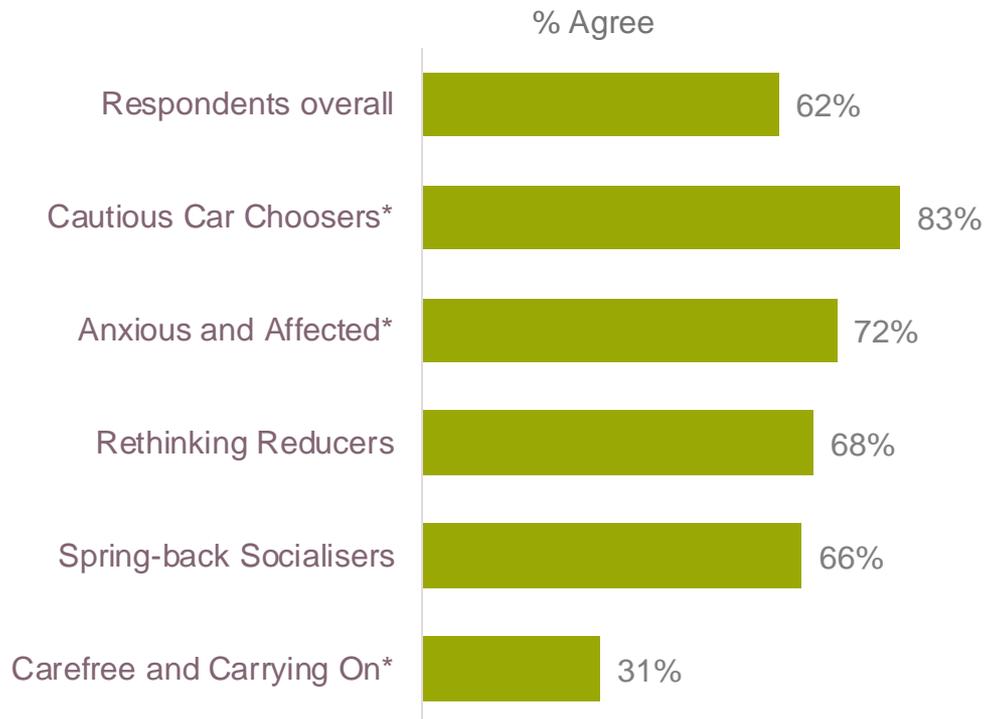
Spring-back Socialisers are more likely than others to agree that as long as passengers are wearing face coverings, relaxing the social distancing on public transport makes sense to them.

'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 more likely than others to say that they won't use public transport unless passengers are required to wear face coverings

'I won't use public transport unless passengers are required to wear face coverings'

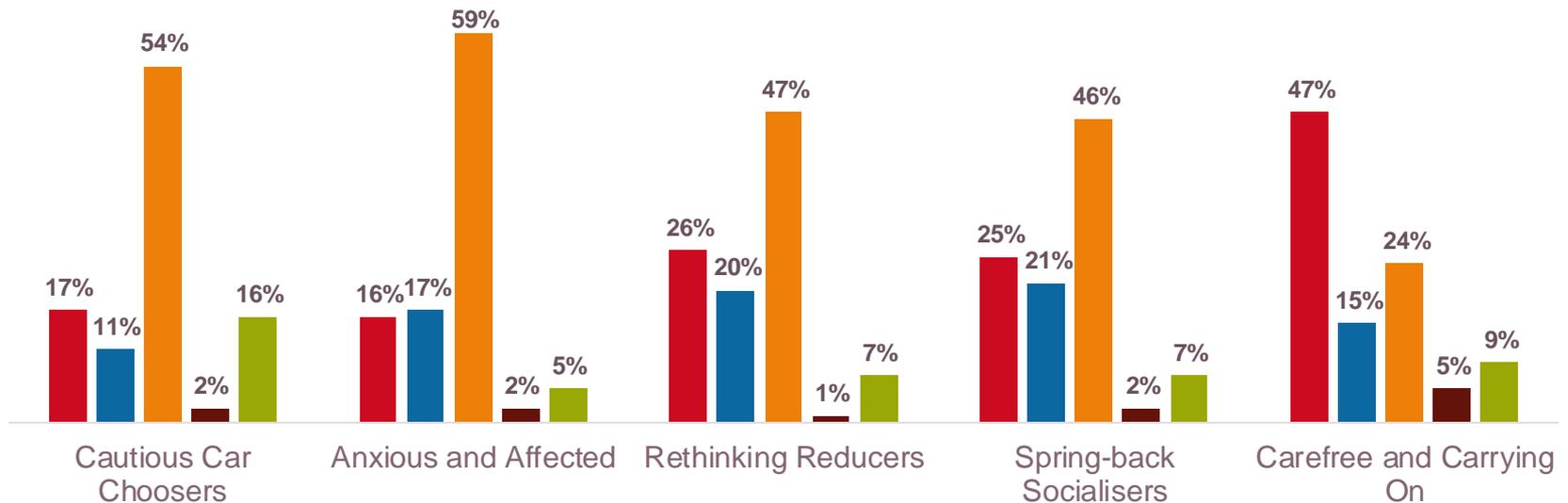


Base: Omnibus w49 only. Excludes don't know/not applicable answers

* Denotes statistically significant difference from respondents overall

Those who are Anxious and Affected are more likely than others to say that they will always wear a face covering when using public transport, even if it is not a requirement. Those who are Carefree and Carrying On are more likely than others to say that they will only wear a face covering if it is a requirement to do so.

Thinking about using public transport over the next three months, which of the following statements best applies to you..?



- I will only wear a face covering on public transport if it is a requirement to do so
- I will sometimes wear a face covering on public transport, even if it is not a requirement to do so (e.g. when it is crowded on board)
- I will always wear a face covering on public transport, even if it is not a requirement to do so
- I am exempt from wearing a face covering
- I don't know

Base: Omnibus w49 only

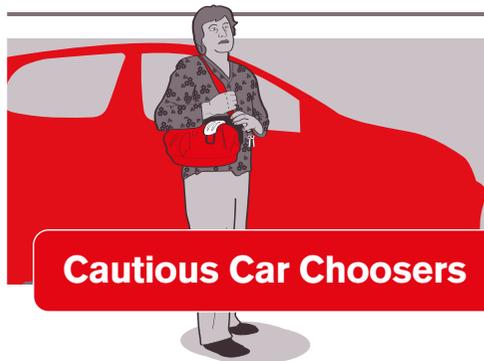
Meet our segments



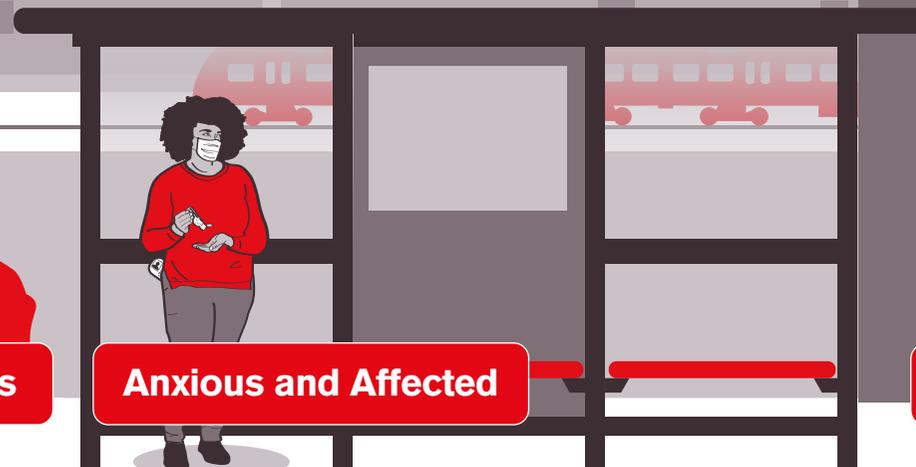
Rethinking Reducers



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 48/49

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 48 / 49	4,051	954	651	380	894	1,038	134

Contact Transport Focus

Any enquiries about this report should be addressed to:

Toby Cotton
Senior Insight Adviser
Toby.cotton@transportfocus.org.uk

Transport Focus
Albany House
86 Petty France
London
SW1H 9EA
www.transportfocus.org.uk

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.