

Covid-19 travel segmentation

4 - 20 June analysis
June 2021



How satisfied are our segments with their journeys on public transport?

This latest report shows how our five segments (see page 30) are feeling after the delay to the planned easing of restrictions earlier this month. Despite this news, or perhaps because of the lack of change, many of the attitudes and views of the segments have remained largely stable. So too have relative sizes of each of the segments. This is important. Changes in attitudes may show themselves as either a shift in attitudes within each segment or people moving from one segment to another.

The number of people using public transport has increased in recent weeks. This means, for the first time, we are now able to use the segments to analyse the journey satisfaction data in our survey. Here the differences between the segments remain as stark as ever.

The Anxious and Affected are much less satisfied with many aspects of their journeys, especially by rail. Less than six in 10 of the Anxious and Affected were satisfied overall with the journey by train, compared to almost nine in 10 Spring-back Socialisers. For buses outside London the gap is smaller, but still clear. Seven in 10 of the Anxious and Affected were satisfied overall compared to more than nine in 10 Spring-back Socialisers. This same gap is in evidence for the ability to keep a safe distance on board, with only half of the Anxious and Affected satisfied on the train, compared to eight in 10 Spring-back Socialisers.

The analysis also shows the Anxious and Affected are finding public transport busier than they expected, especially when using the train. Two in three say the train was busier than expected, with one in four saying it was 'a lot busier than expected'. In comparison, just one in three Spring-back Socialisers said the train was busier than they expected. Satisfaction with the ease of finding out how busy it is expected to be is low across the segments, but it's clear the Anxious and Affected are not getting the information they need, with only around four 4 in 10 satisfied with this information.

How satisfied are our segments with their journeys on public transport?

One key issue where the satisfaction gap between segments is smaller is satisfaction with other passengers' behaviour and compliance with face coverings on trains. Here satisfaction is relatively low across the segments. Only half of the Anxious and Affected were satisfied with other passengers' behaviour on the train or with the number of people wearing face coverings, but even amongst the Spring-back Socialisers only around seven in 10 were satisfied.

That there is a satisfaction gap, and that the Anxious and Affected are least satisfied should not be surprising, we know that this segment has strong concerns about Covid-19. However, that satisfaction is so low for this segment is a concern. At the same time, we can see an increase in the Anxious and Affected saying they are not using public transport because they feel it is not safe to do so, back up to more than four in 10. The Anxious and Affected may be the segment most reliant on public transport, but if their journeys don't improve then will some try to find another way to travel? All this shows that even if restrictions ease operators still need to do more to help their most anxious customers feel comfortable choosing public transport.

About this report

The majority of 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.

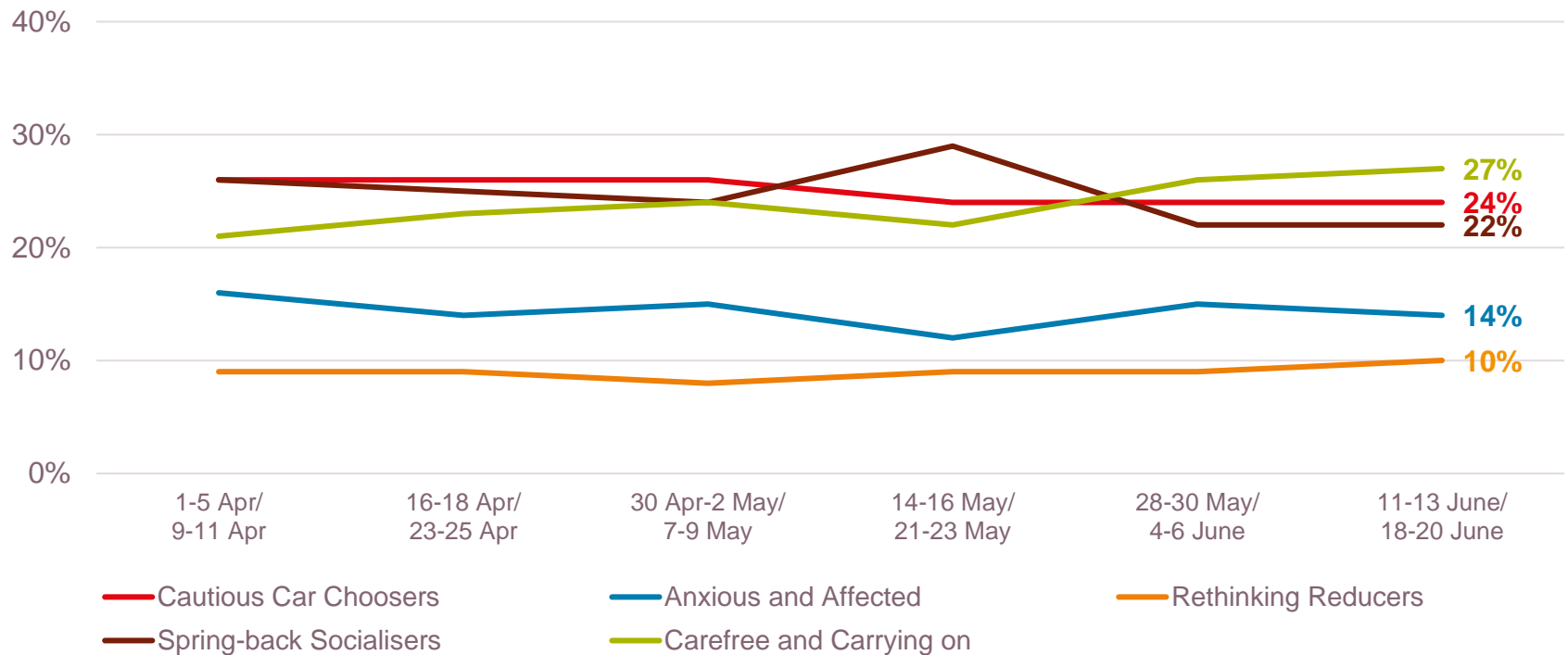
| Fieldwork dates | Omnibus Waves |
|----------------------------|---------------|
| 1-5 April / 9-11 April | W40 + W41 |
| 16-18 April / 23-25 April | W42 + W43 |
| 30 April – 2 May / 7-9 May | W44 + W45 |
| 14-16 May / 21-23 May | W46 + W47 |
| 28-30 May / 4-6 June | W48 + W49 |
| 11-13 June / 18-20 June | W50 + W51 |

Where indicated, some of the analysis presented in this report is based on three waves of data aggregated, or based on a single wave's results.

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.

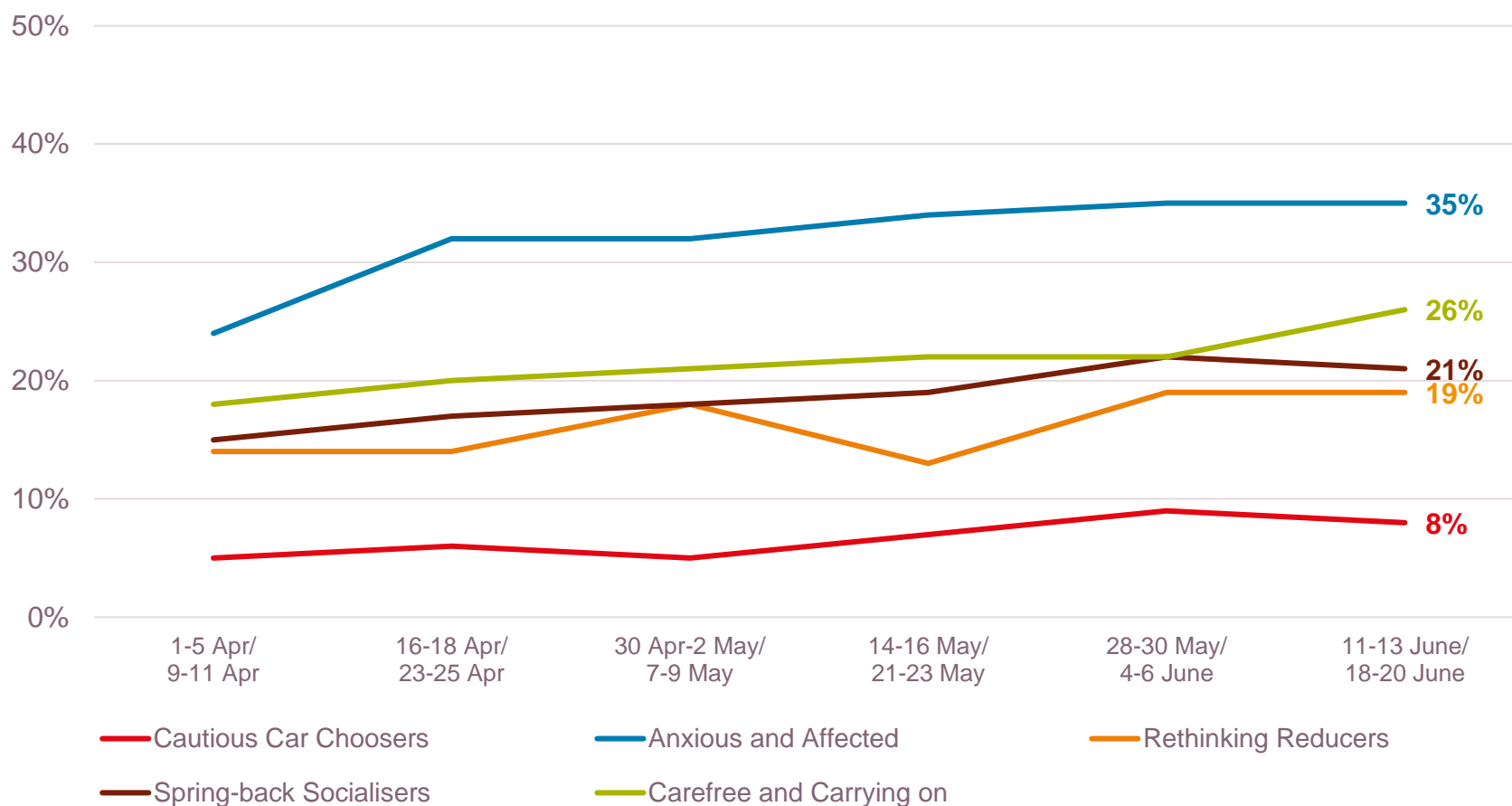
Segment size*



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

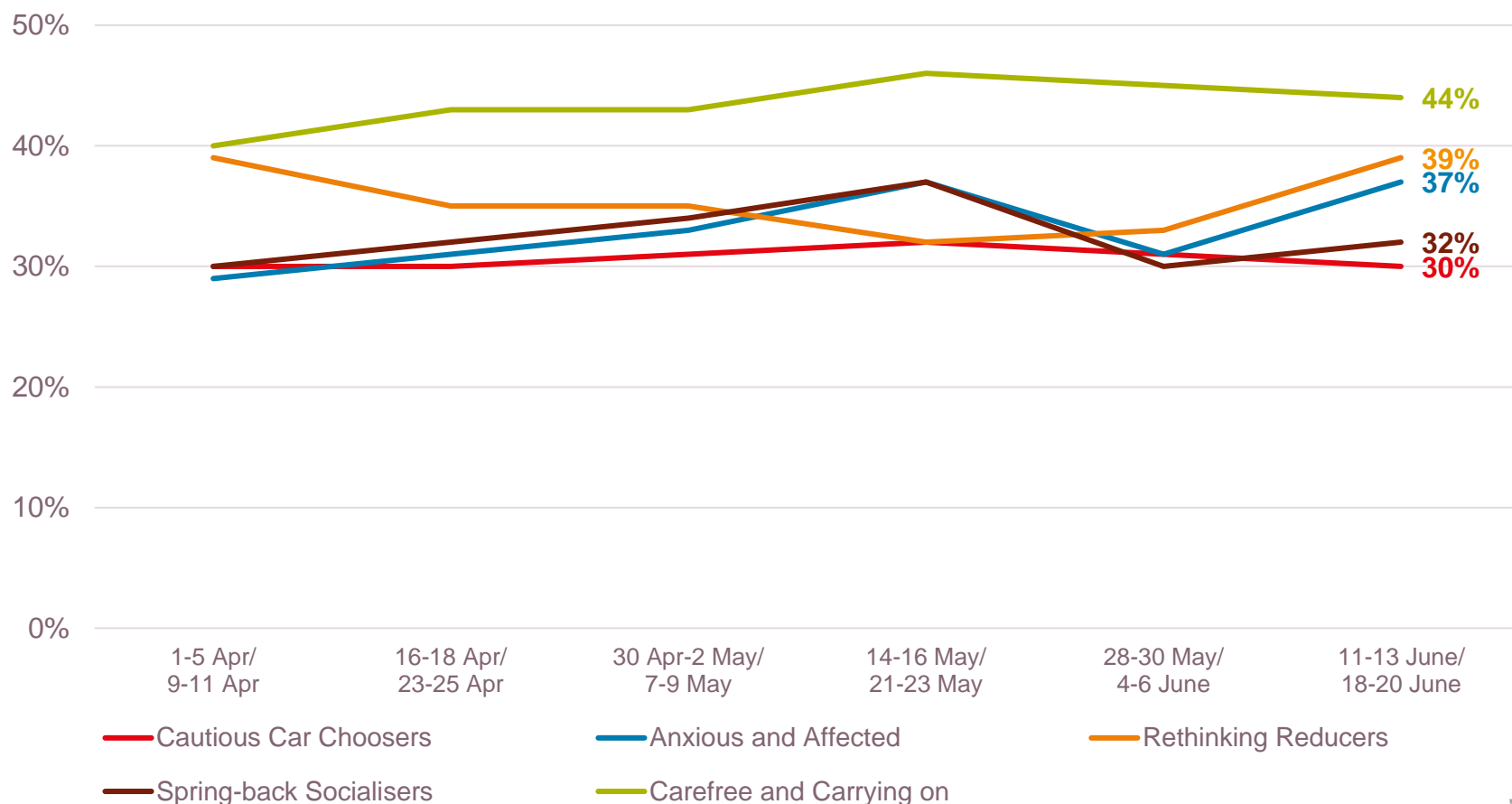
The Anxious and Affected segment are more likely than others to have used public transport in the last seven days

Use of public transport in the last seven days



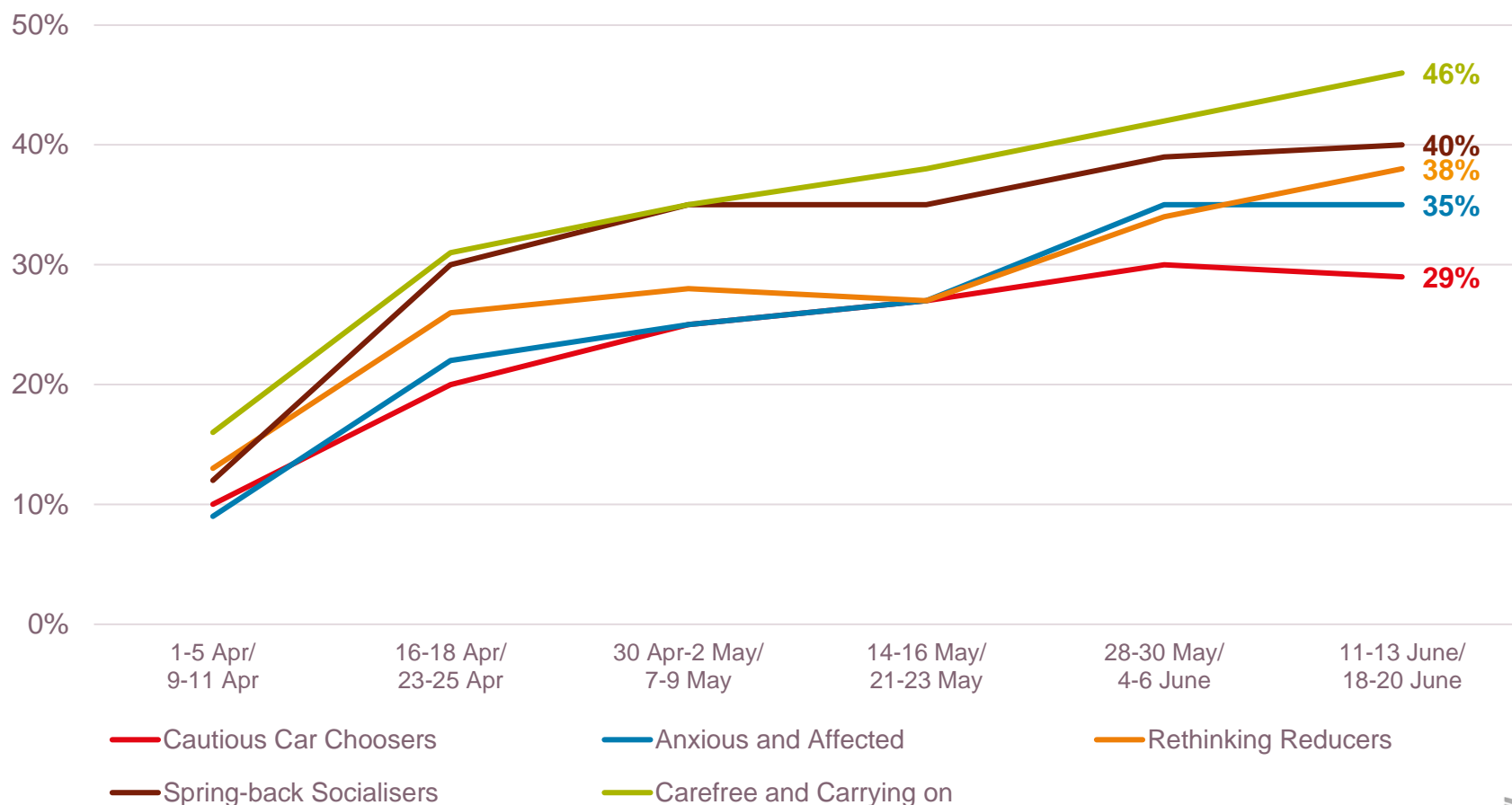
The Carefree and Carrying on segment continue to be more likely than others to be making journeys to or from work in the last seven days

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



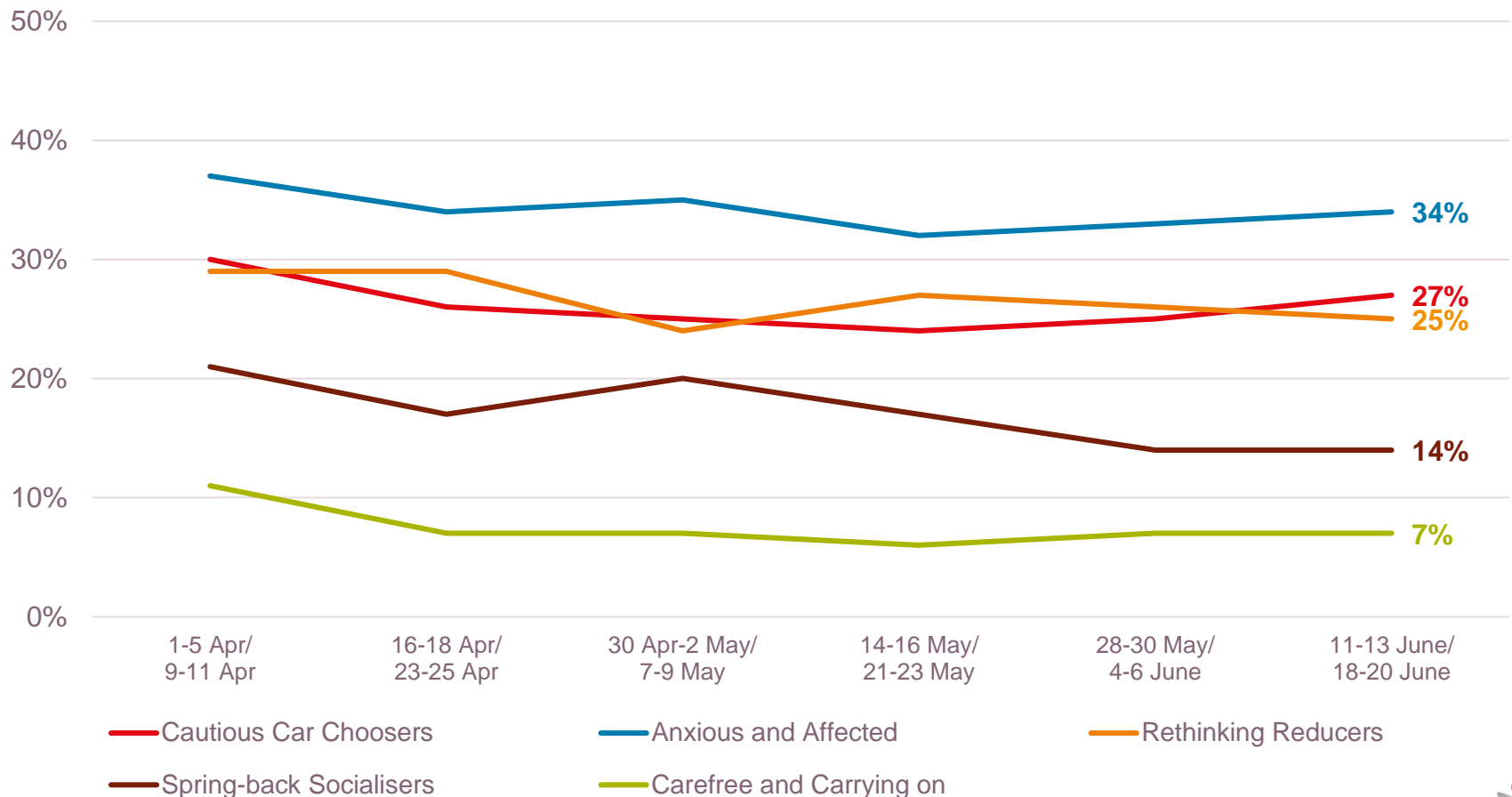
The Carefree and Carrying on segment and the Spring-back Socialisers are more likely than others to be making journeys for leisure reasons

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



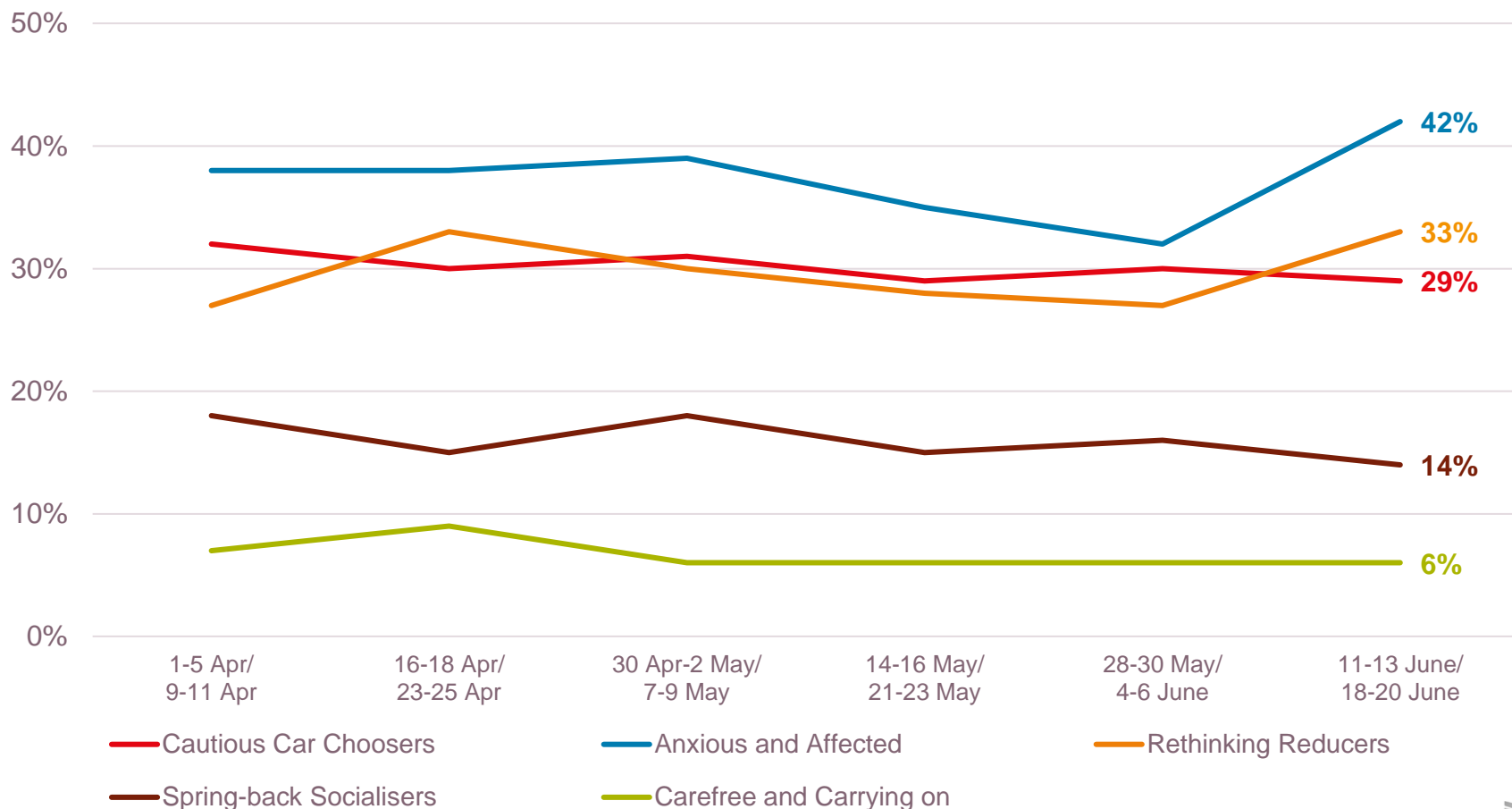
Among those not using public transport, those in the Anxious and Affected segment are more likely than others to be avoiding doing so

Proportions avoiding using public transport



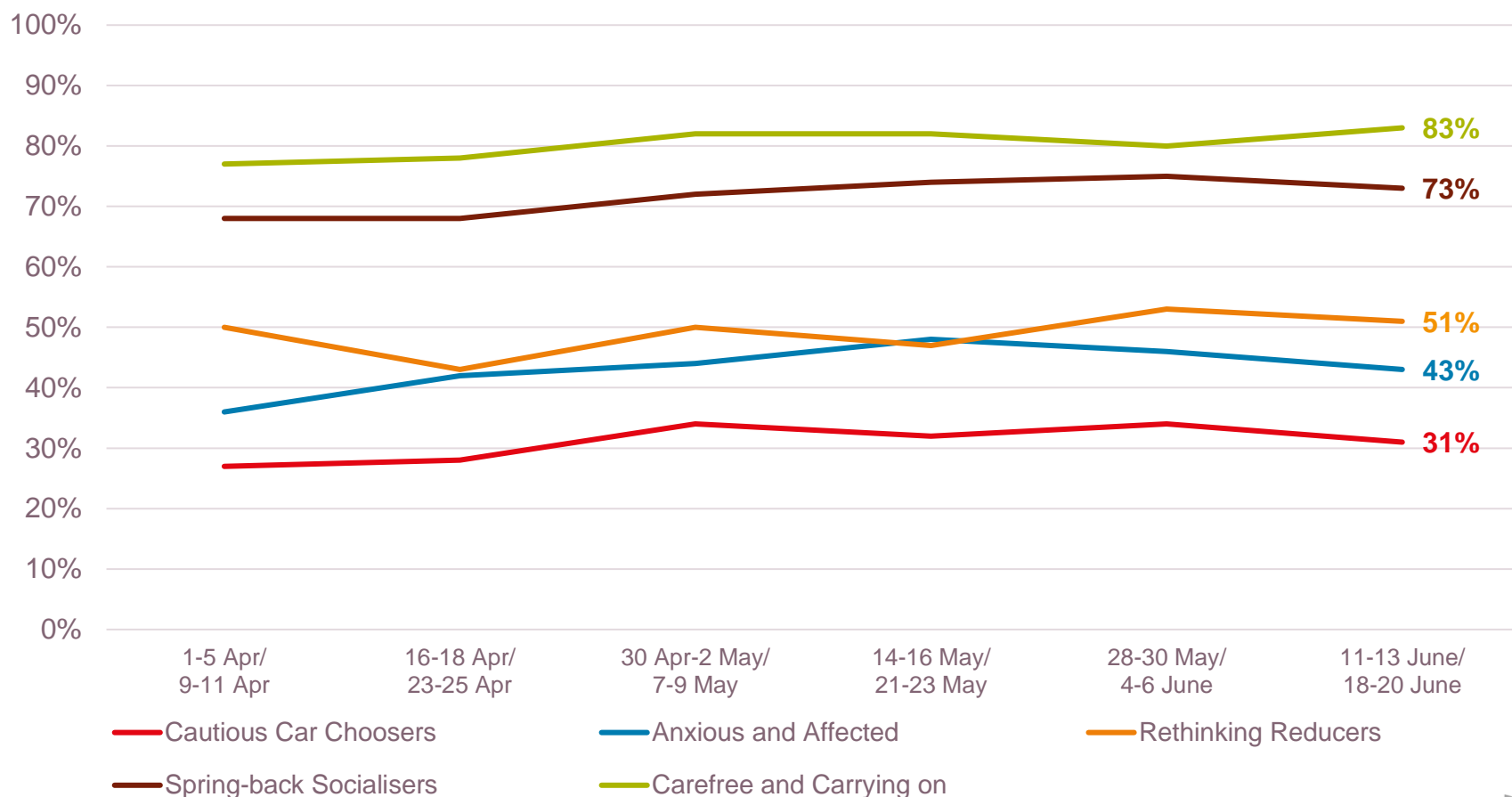
Those in the Anxious and Affected segment are also more likely than others not to be using public transport because they do not feel it is safe to do so

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



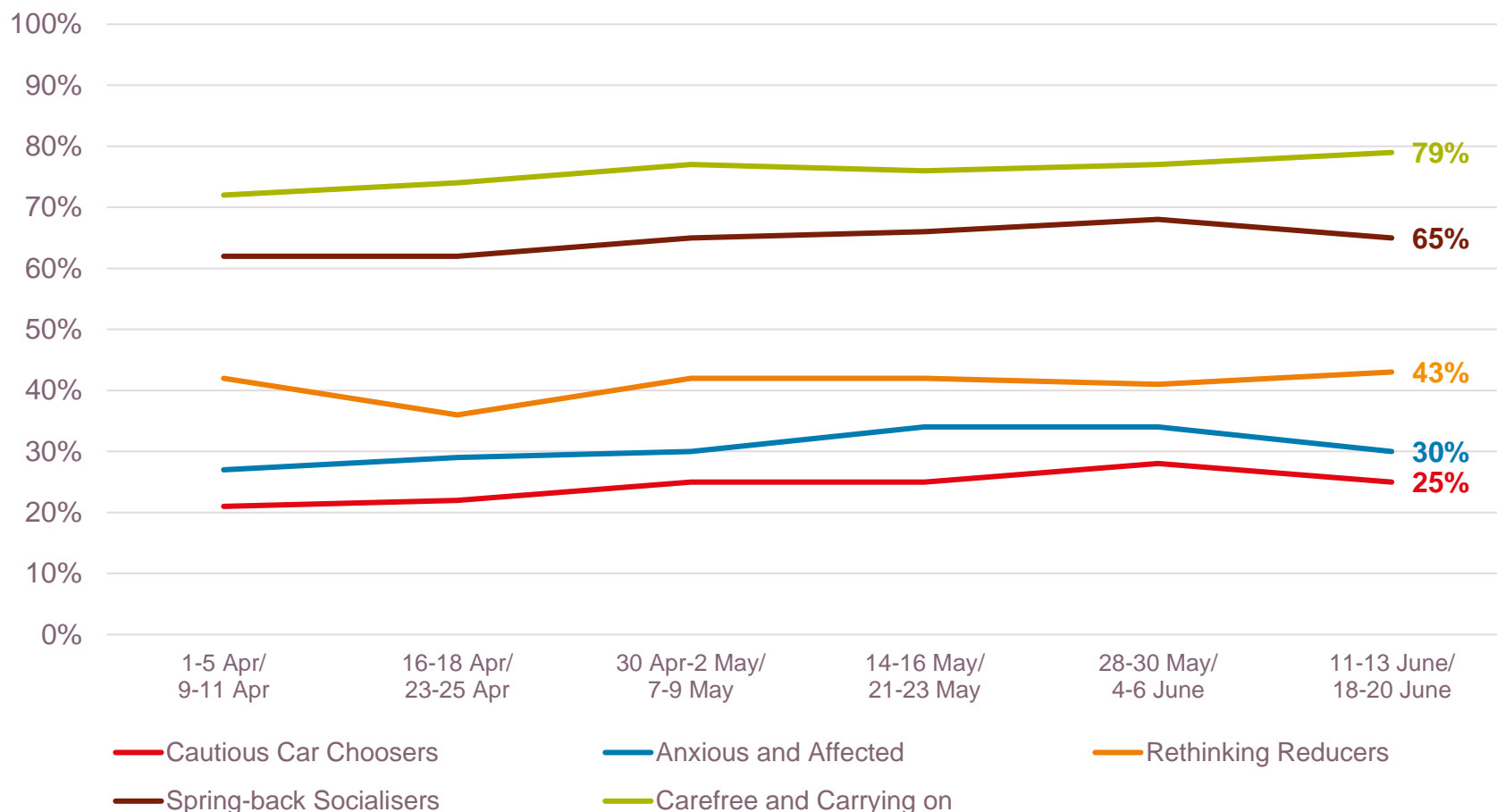
Among those who have not used a train in the last seven days, those who are in the Carefree and Carrying on segment are more likely than others to say that they would feel safe to do so

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



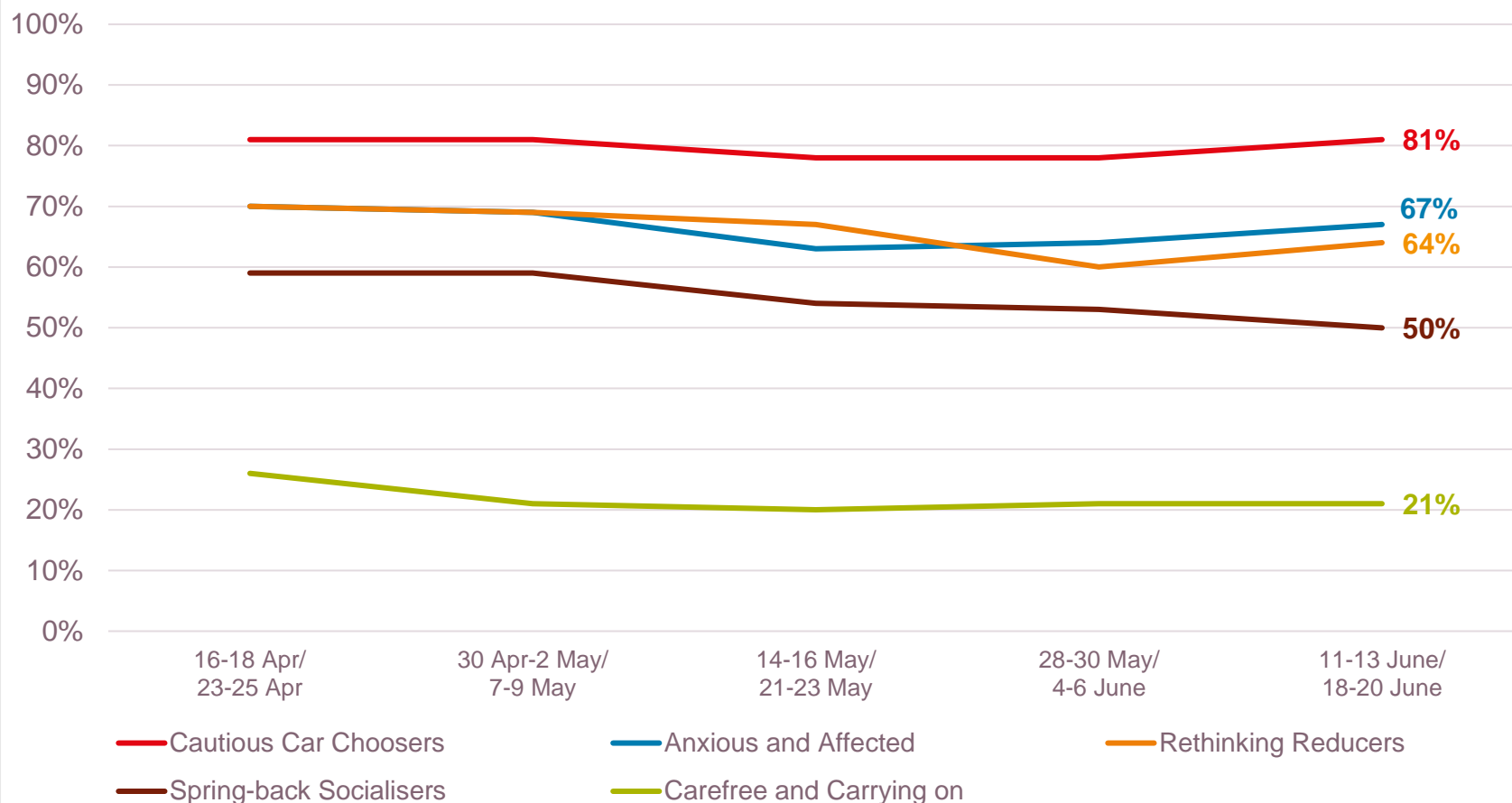
Among those who have not used a bus in the last seven days, those who are in the Carefree and Carrying on segment are again more likely than others to say that they would feel safe to do so

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



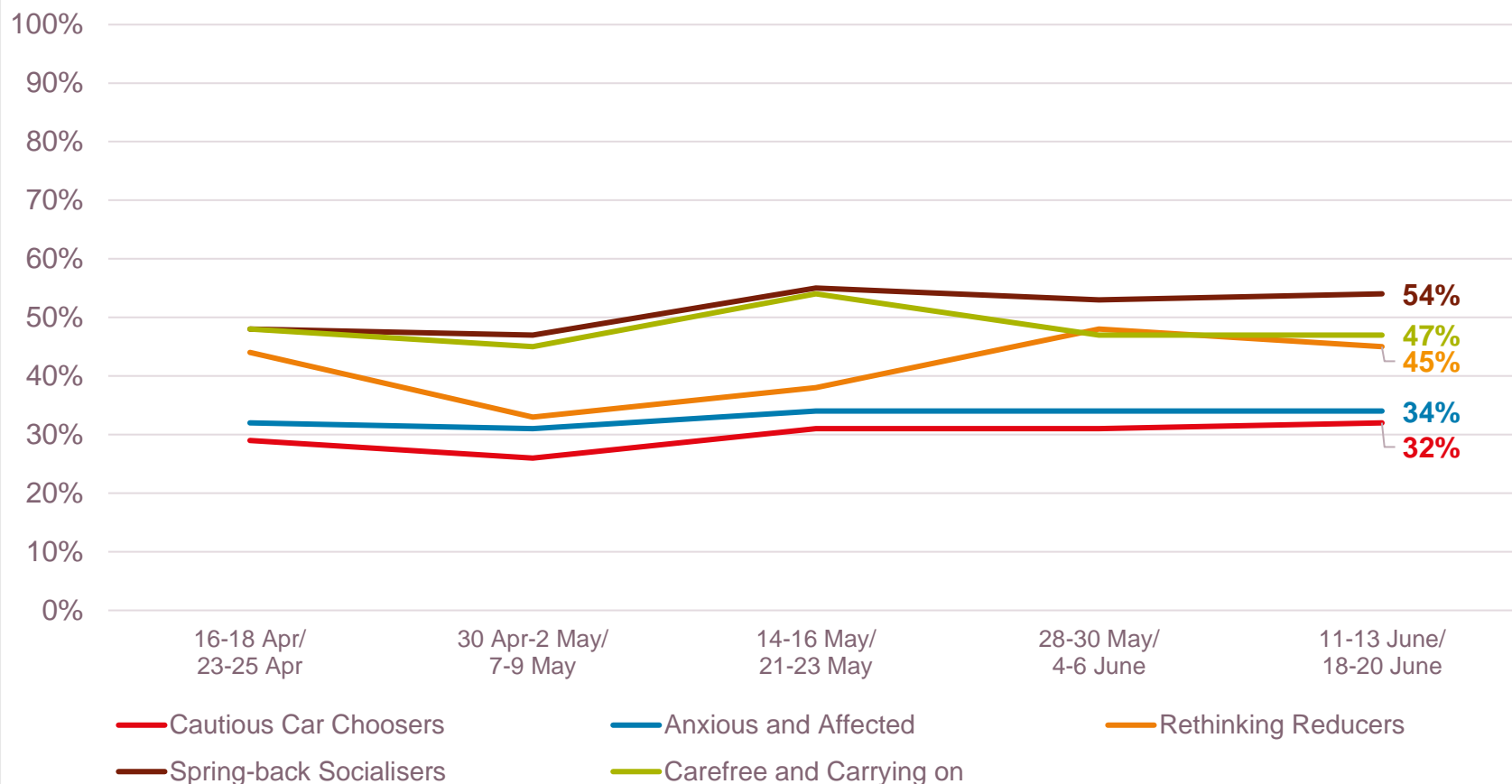
Those in the 'Cautious Car Choosers' segment are more likely than others to agree that they won't use public transport unless social distancing is in place. Those who are 'Carefree and Carrying On' are much less likely to hold this view

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



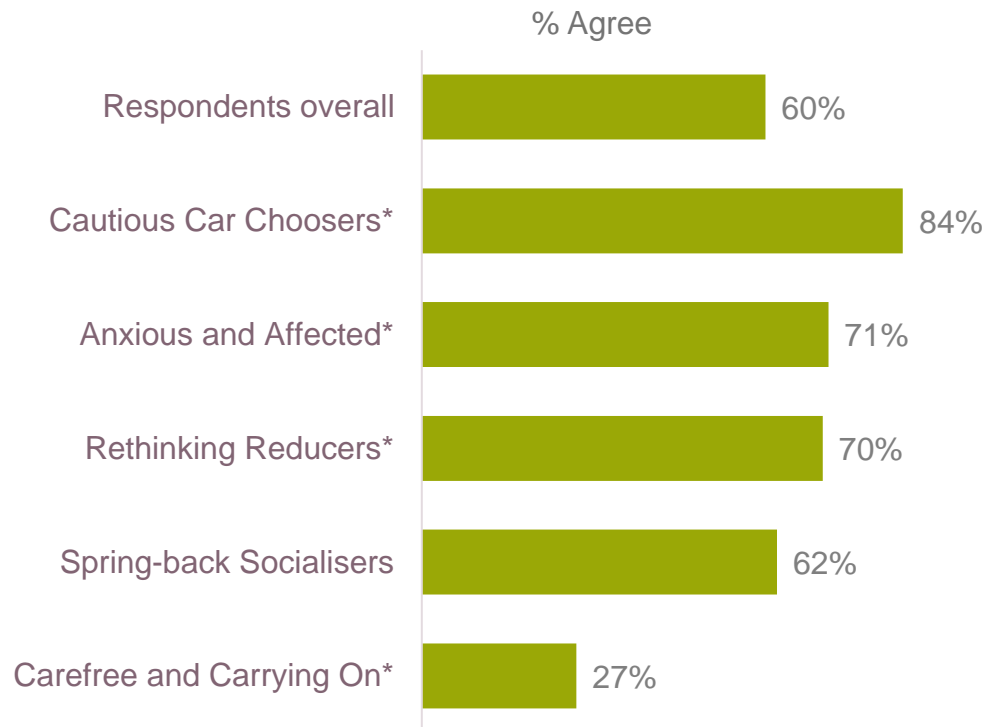
Spring-back Socialisers are more likely than others to agree that as long as passengers are wearing face coverings, relaxing the social distancing on public transport makes sense to them.

‘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'

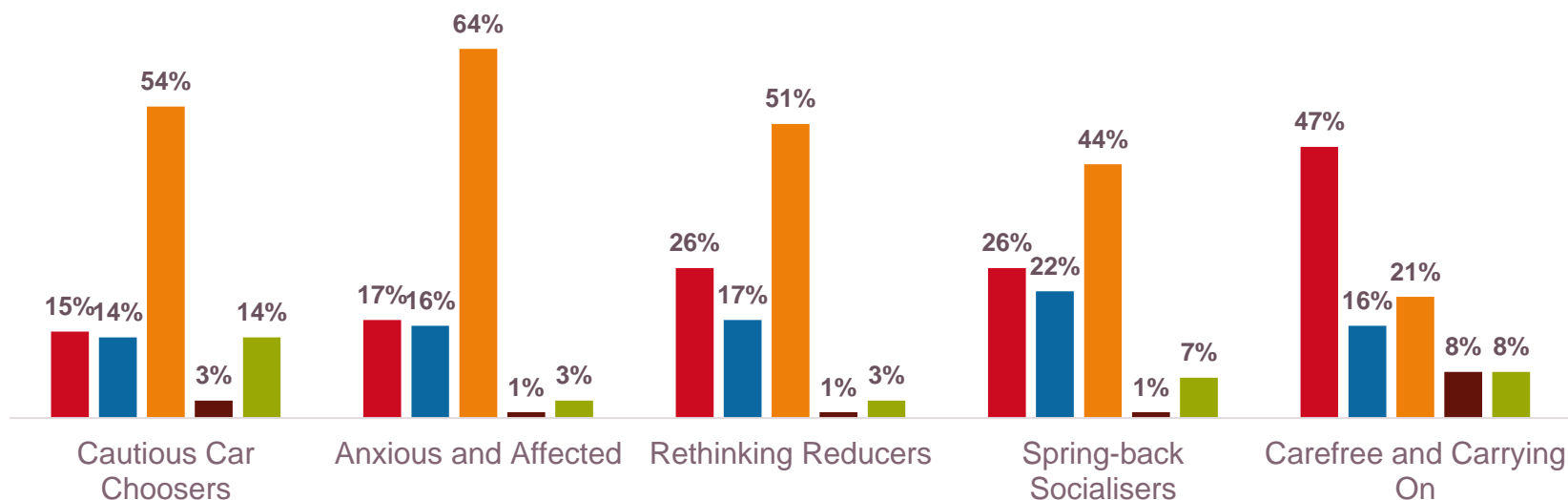


Base: Omnibus w50/w51 aggregated (asked from w49 only). Excludes don't know/not applicable answers

* 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 w50 only

Satisfaction with aspects of train and bus journeys by segment

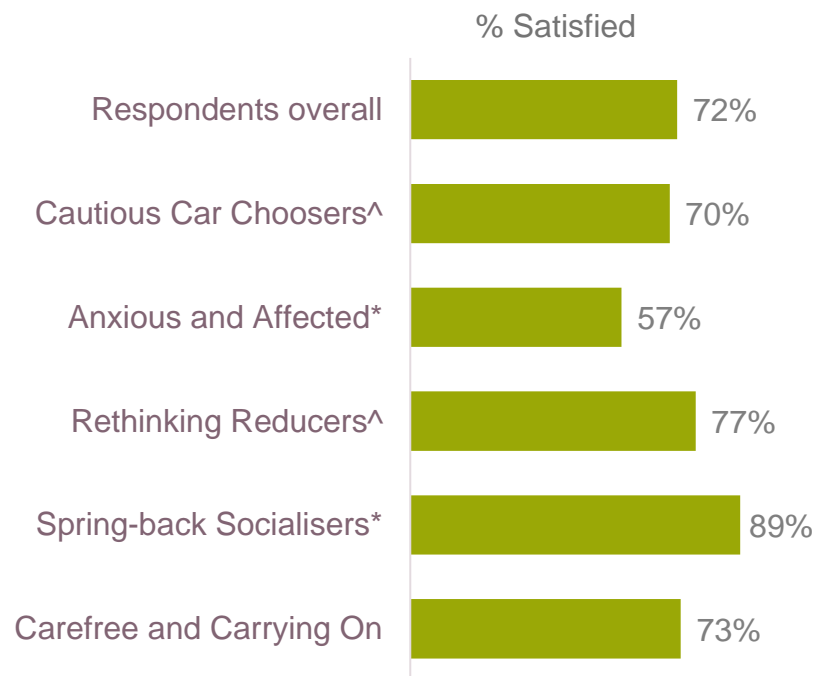
The section of the report below contains an analysis of the differing levels of satisfaction with various aspects of train and bus journeys between segments. Unlike elsewhere in this report, these findings are presented in terms of three waves of aggregated omnibus data; that is waves 49, 50 and 51 which cover train and bus journeys made between 28 May and 20 June 2021.

In this time period small numbers of Cautious Car Choosers (who are less likely than other groups to use public transport) made a journey by bus, and therefore the results for this segment are excluded from the analysis.

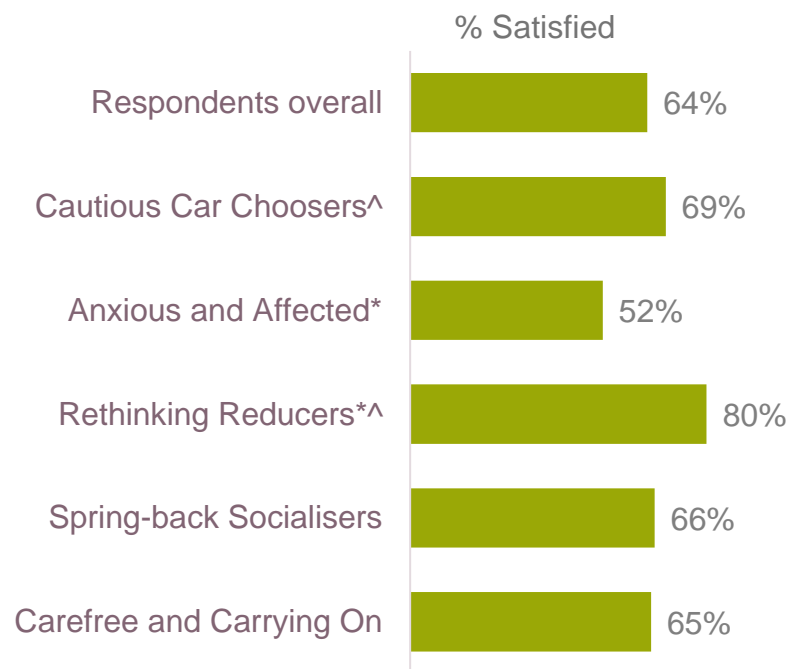
Spring-back Socialisers are more likely than others to be satisfied with their train journey overall, while Rethinking Reducers are more likely than others to be satisfied with the behaviour of other passengers.

Users of trains in last seven days (three waves aggregated)

Overall satisfaction



Other passenger behaviour



Base: Omnibus w49-w51 aggregated. Those who used a train between 28th May and 20th June 2021 (520).

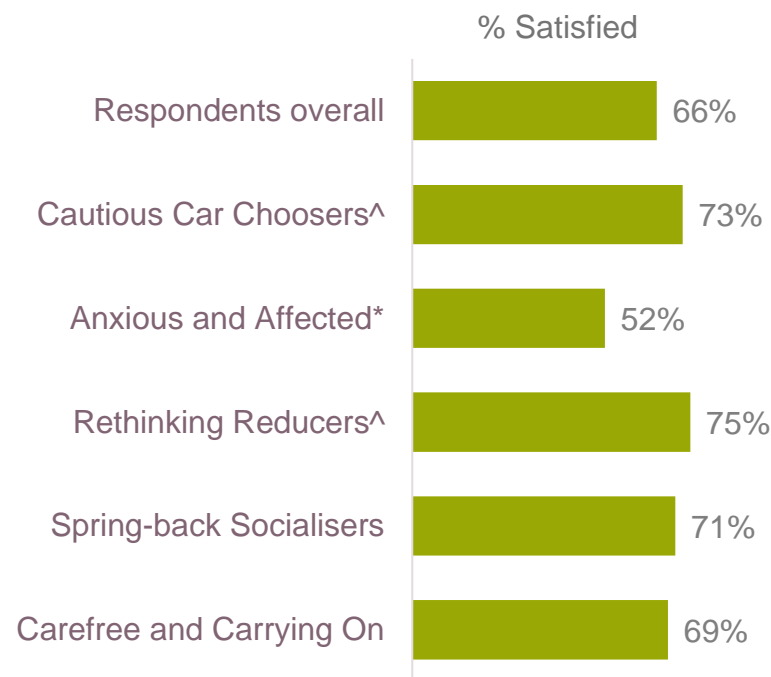
Cautious Car Choosers (61), Anxious and Affected (121), Rethinking Reducers (50), Spring-back Socialisers (108), Carefree and Carrying On (176)

* Denotes statistically significant difference from respondents overall. ^ **Caution – low base**

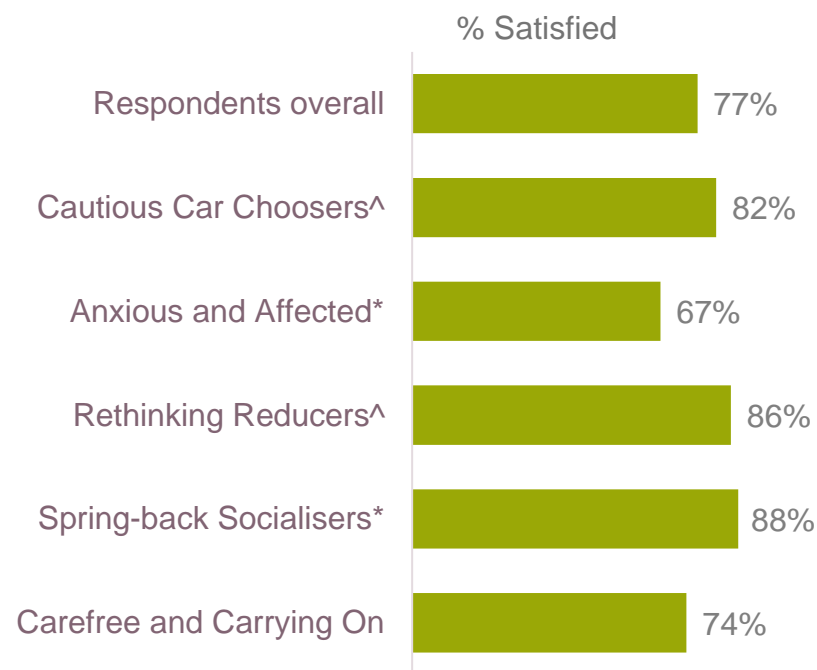
Those who are Anxious and Affected are less likely than others to be satisfied with the number of people wearing face coverings. Spring-back Socialisers are more likely than others to be satisfied with the cleanliness of the train.

Users of trains in last seven days (three waves aggregated)

Number of people wearing face coverings



Cleanliness



Base: Omnibus w49-w51 aggregated. Those who used a train between 28th May and 20th June 2021 (520).

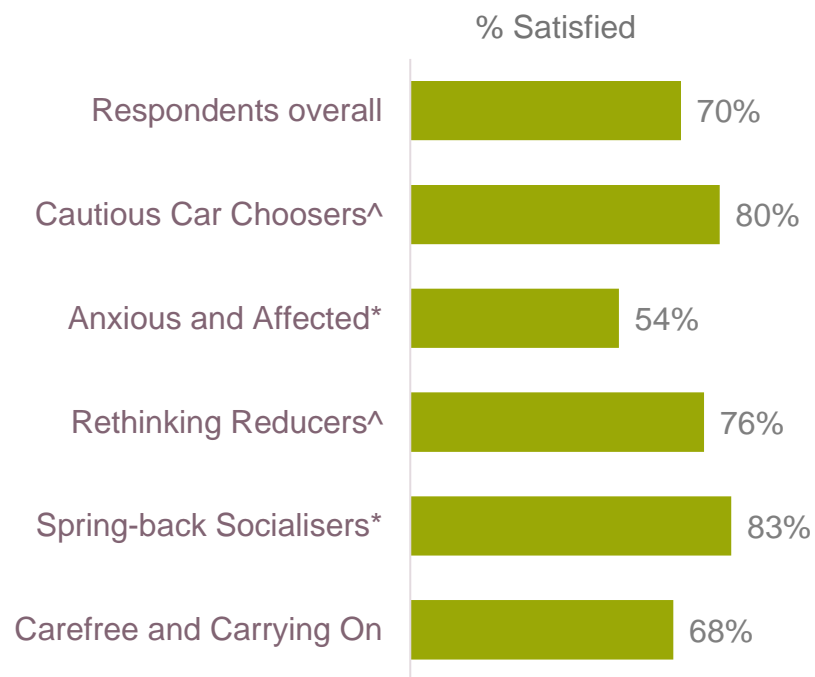
Cautious Car Choosers (61), Anxious and Affected (121), Rethinking Reducers (50), Spring-back Socialisers (108), Carefree and Carrying On (176)

* Denotes statistically significant difference from respondents overall. ^ **Caution – low base**

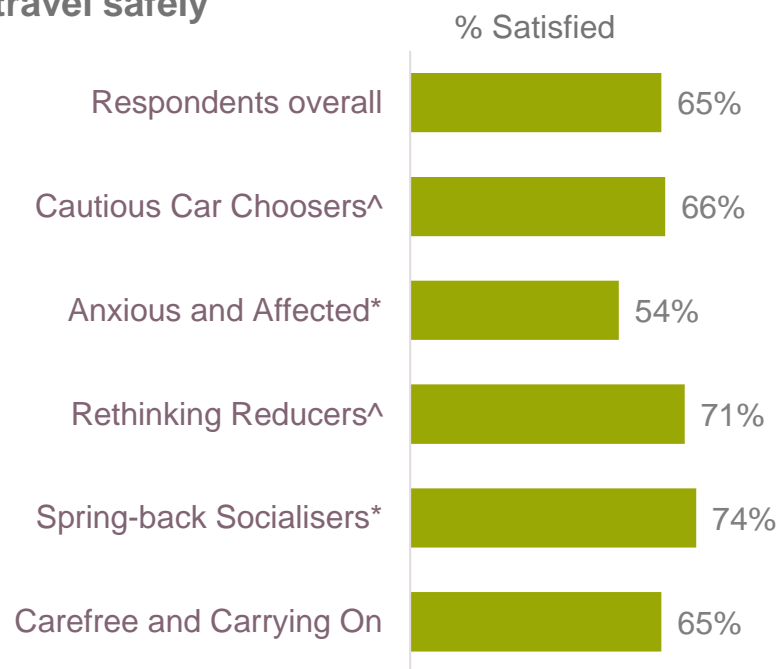
Spring-back Socialisers are more likely than others to be satisfied with the ability to keep a safe distance and are more likely than others to be satisfied with what the operator did to help passengers to travel safely.

Users of trains in last seven days (three waves aggregated)

The ability to keep a safe distance



What the operator did to help passengers to travel safely



Base: Omnibus w49-w51 aggregated. Those who used a train between 28th May and 20th June 2021 (520).

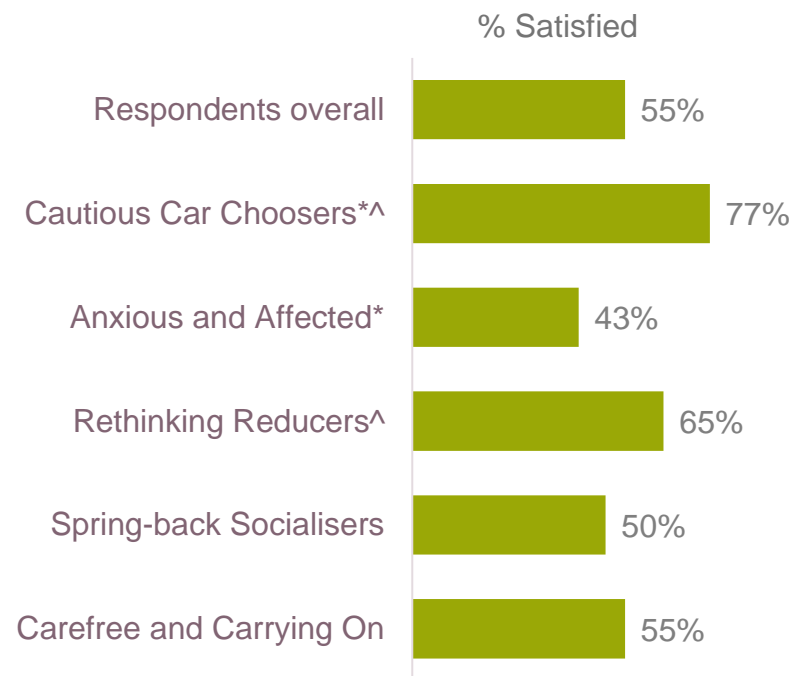
Cautious Car Choosers (61), Anxious and Affected (121), Rethinking Reducers (50), Spring-back Socialisers (108), Carefree and Carrying On (176)

* Denotes statistically significant difference from respondents overall. ^ **Caution – low base**

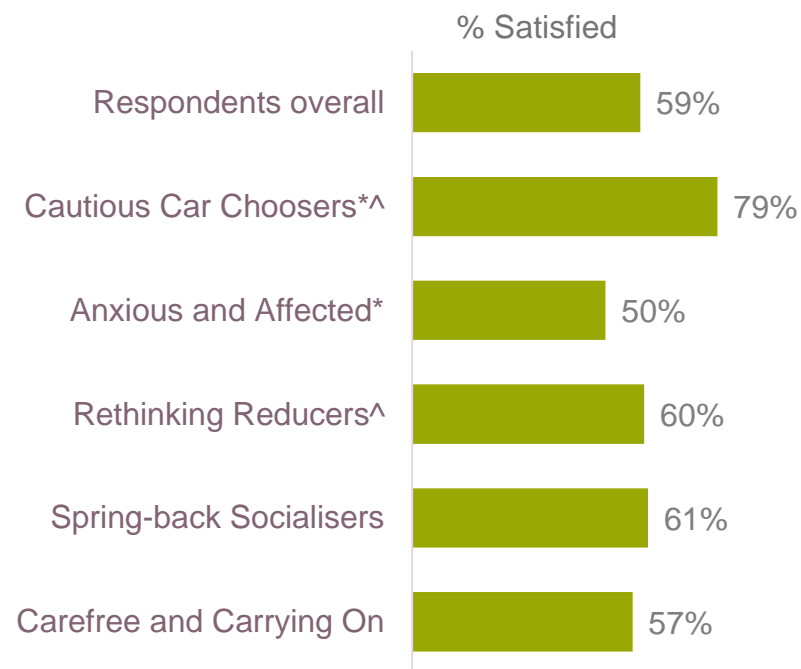
Cautious Car Choosers are more likely than others to be satisfied with the ease of finding out how busy the train service would be and also with how the staff helped them to feel safe during the journey

Users of trains in last seven days (three waves aggregated)

Ease of finding out how busy



How staff helped you to feel safe



Base: Omnibus w49-w51 aggregated. Those who used a train between 28th May and 20th June 2021 (520).

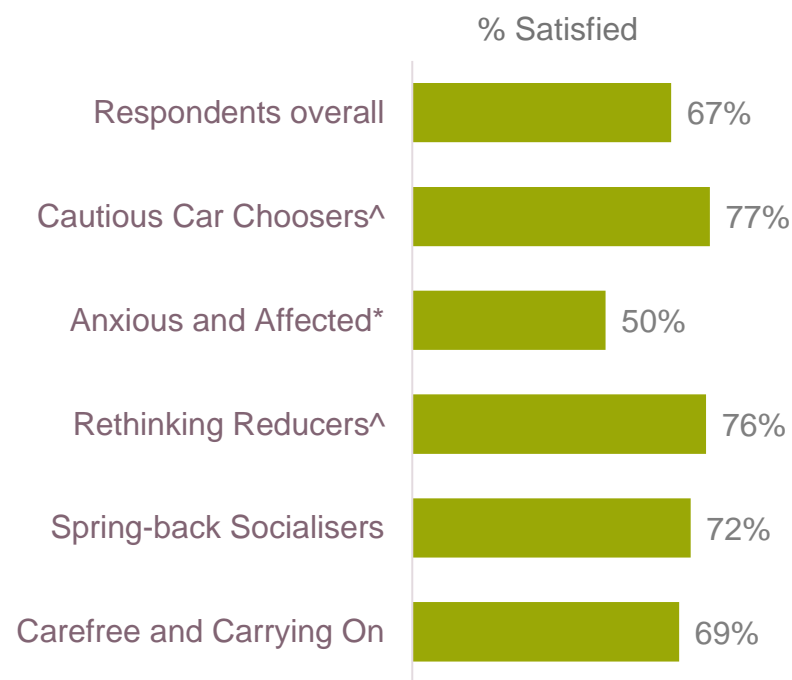
Cautious Car Choosers (61), Anxious and Affected (121), Rethinking Reducers (50), Spring-back Socialisers (108), Carefree and Carrying On (176)

* Denotes statistically significant difference from respondents overall. ^ **Caution – low base**

Those who are Anxious and Affected are less likely than others to be satisfied with how well ventilated the space was on board the train

Users of trains in last seven days (three waves aggregated)

How well ventilated the space was onboard



Base: Omnibus w49-w51 aggregated. Those who used a train between 28th May and 20th June 2021 (520).

Cautious Car Choosers (61), Anxious and Affected (121), Rethinking Reducers (50), Spring-back Socialisers (108), Carefree and Carrying On (176)

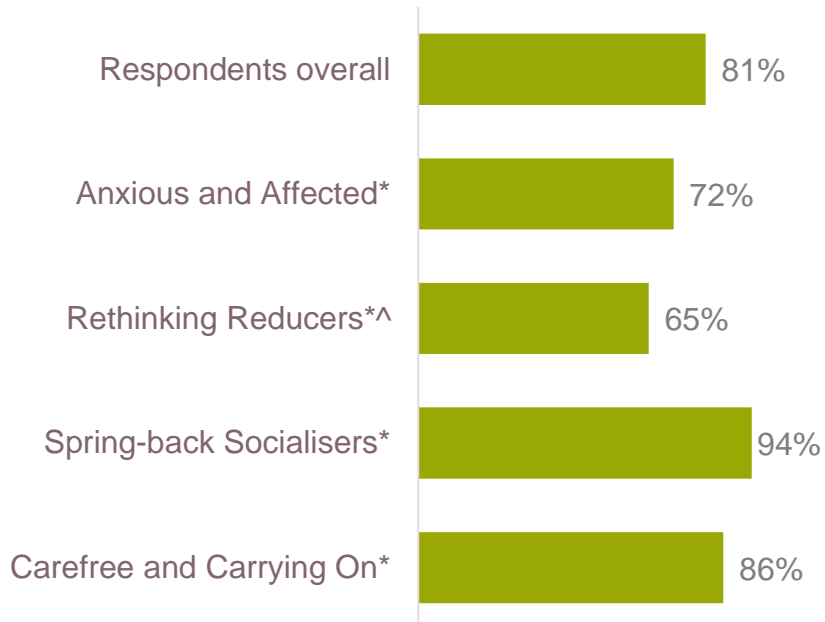
* Denotes statistically significant difference from respondents overall. ^ **Caution – low base**

Spring-back Socialisers are more likely than others to be satisfied with bus journey overall, and to be satisfied with the behaviour of other passengers. Rethinking Reducers are the least likely to be satisfied overall.

Users of bus outside London in last seven days (three waves aggregated)

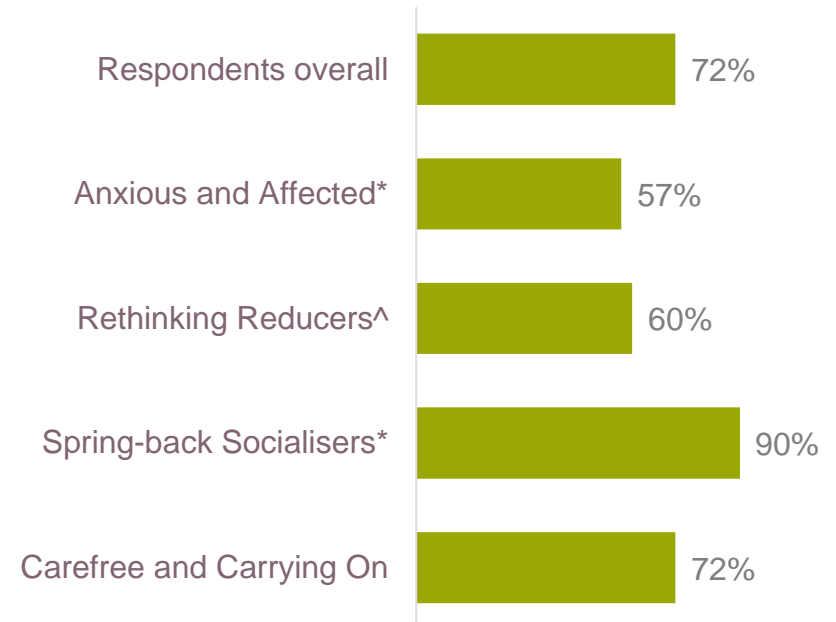
Overall satisfaction

% Satisfied



Other passenger behaviour

% Satisfied



Base: Omnibus w49-w51 aggregated. Those who used a bus outside London between 28th May and 20th June 2021 (613).

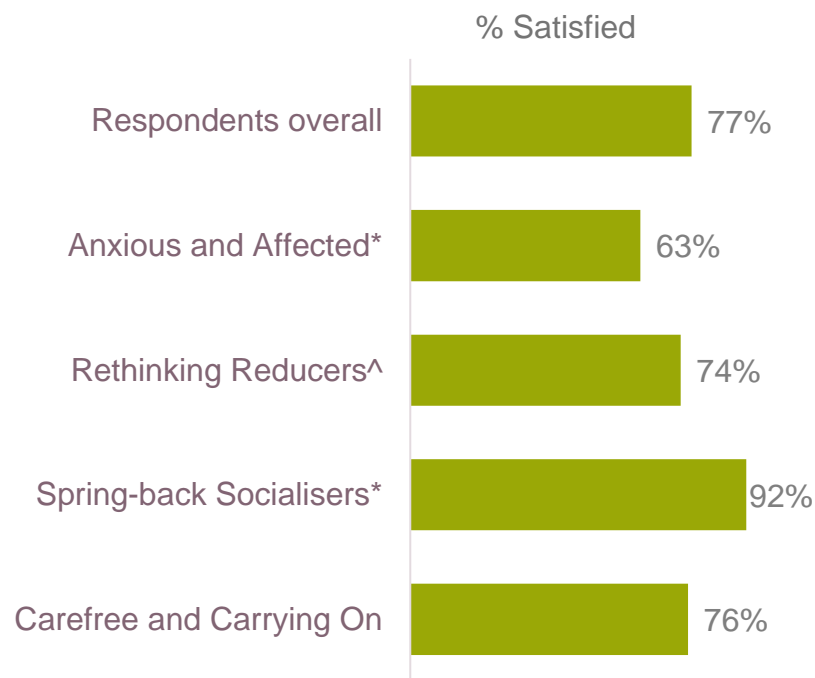
Anxious and Affected (176), Rethinking Reducers (50), Spring-back Socialisers (140), Carefree and Carrying On (204)

* Denotes statistically significant difference from respondents overall. ^ **Caution – low base**

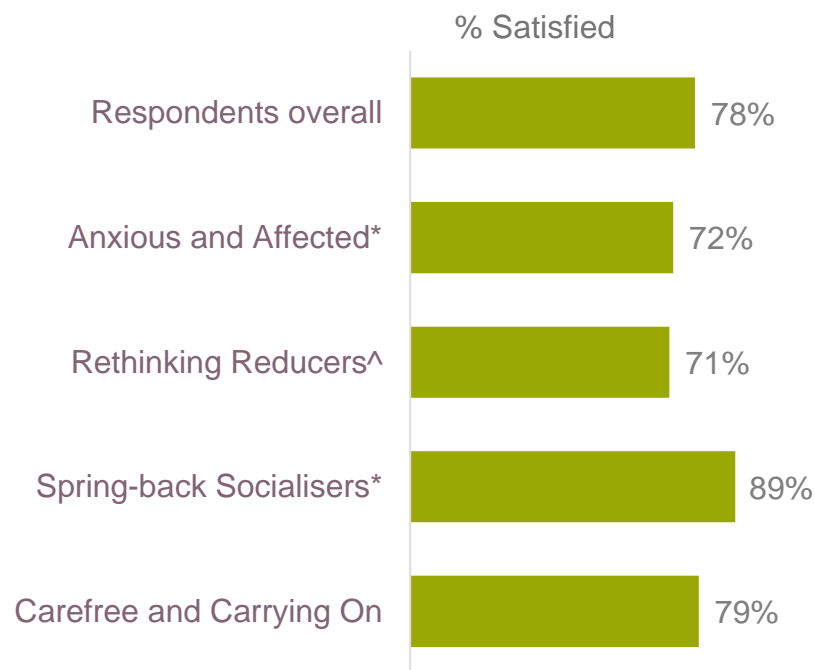
Spring-back Socialisers are more likely than others to be satisfied with the number of people wearing face coverings, and to be satisfied with the cleanliness of the bus. Those who are Anxious and Affected are the least likely to be satisfied.

Users of bus outside London in last seven days (three waves aggregated)

Number of people wearing face coverings



Cleanliness



Base: Omnibus w49-w51 aggregated. Those who used a bus outside London between 28th May and 20th June 2021 (613).

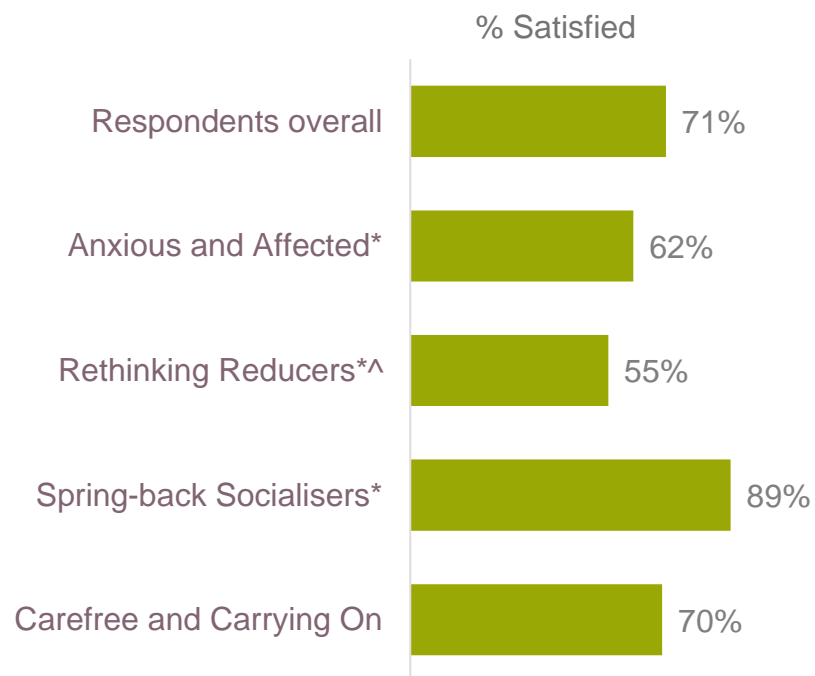
Anxious and Affected (176), Rethinking Reducers (50), Spring-back Socialisers (140), Carefree and Carrying On (204)

* Denotes statistically significant difference from respondents overall. ^ **Caution – low base**

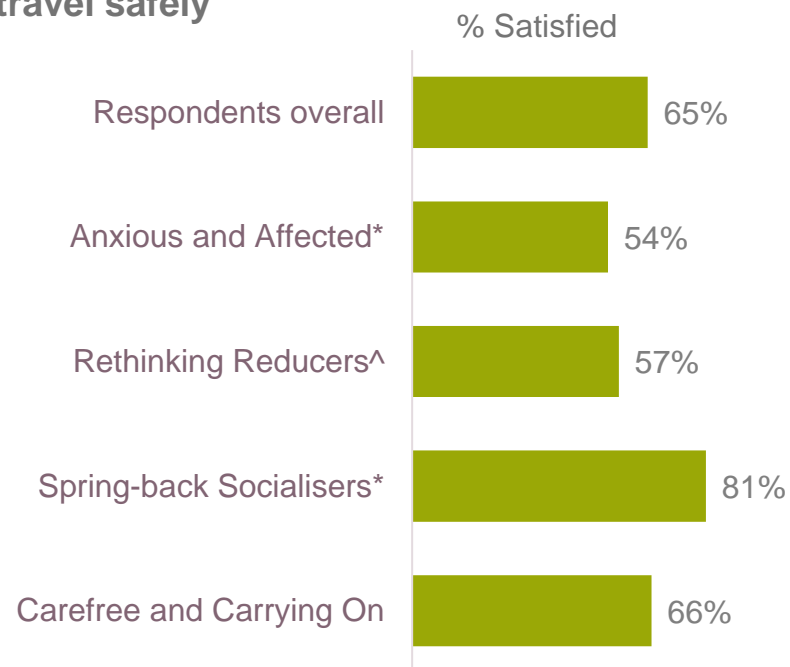
Spring-back Socialisers are more likely than others to be satisfied with the ability to keep a safe distance and are more likely than others to be satisfied with what the operator did to help passengers to travel safely.

Users of bus outside London in last seven days (three waves aggregated)

The ability to keep a safe distance



What the operator did to help passengers to travel safely



Base: Omnibus w49-w51 aggregated. Those who used a bus outside London between 28th May and 20th June 2021 (613).

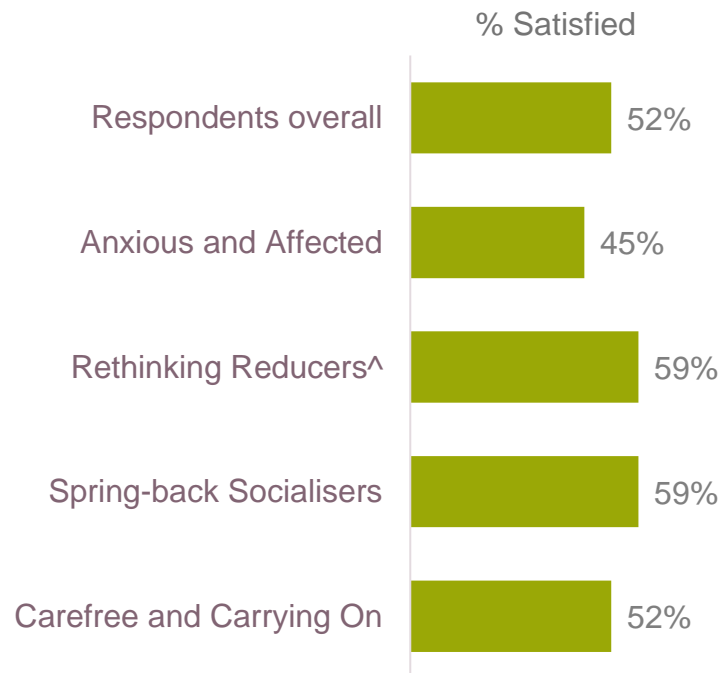
Anxious and Affected (176), Rethinking Reducers (50), Spring-back Socialisers (140), Carefree and Carrying On (204)

* Denotes statistically significant difference from respondents overall. ^ **Caution – low base**

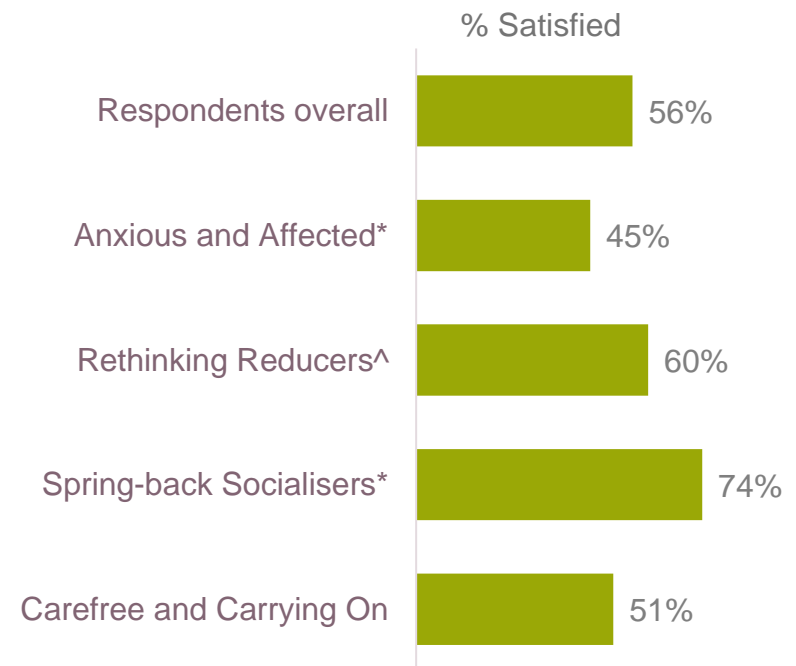
Spring-back Socialisers are more likely than others to be satisfied with the how the staff helped them to feel safe during the journey. Those who are Anxious and Affected are least likely to be satisfied with this aspect of their journey.

Users of bus outside London in last seven days (three waves aggregated)

Ease of finding out how busy



How staff helped you to feel safe



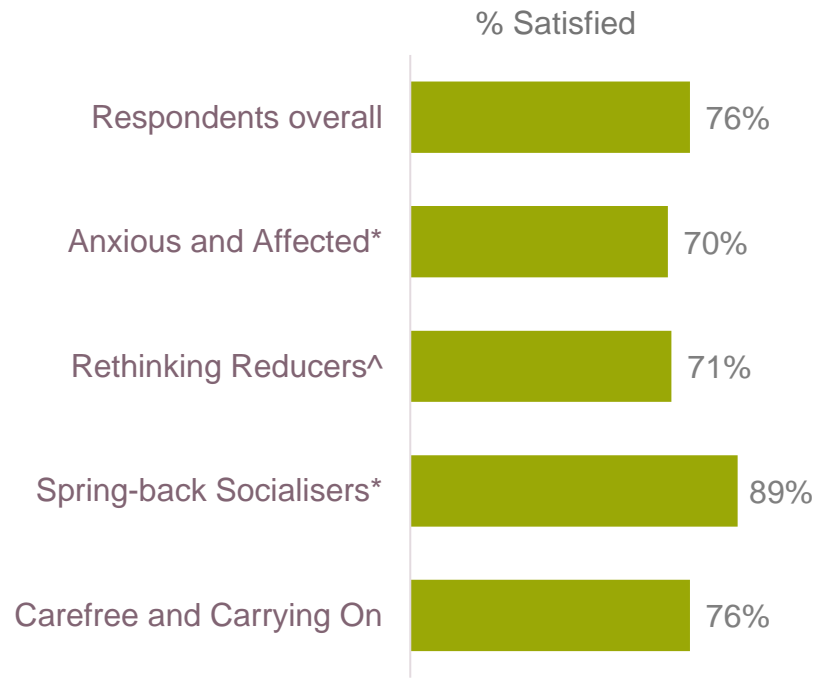
Base: Omnibus w49-w51 aggregated. Those who used a bus outside London between 28th May and 20th June 2021 (613). Anxious and Affected (176), Rethinking Reducers (50), Spring-back Socialisers (140), Carefree and Carrying On (204)

* Denotes statistically significant difference from respondents overall. ^ **Caution – low base**

Spring-back Socialisers are more likely than others to be satisfied with how ventilated the space was onboard. Those who are Anxious and Affected are least likely to be satisfied.

Users of bus outside London in last seven days (three waves aggregated)

How well ventilated the space was onboard



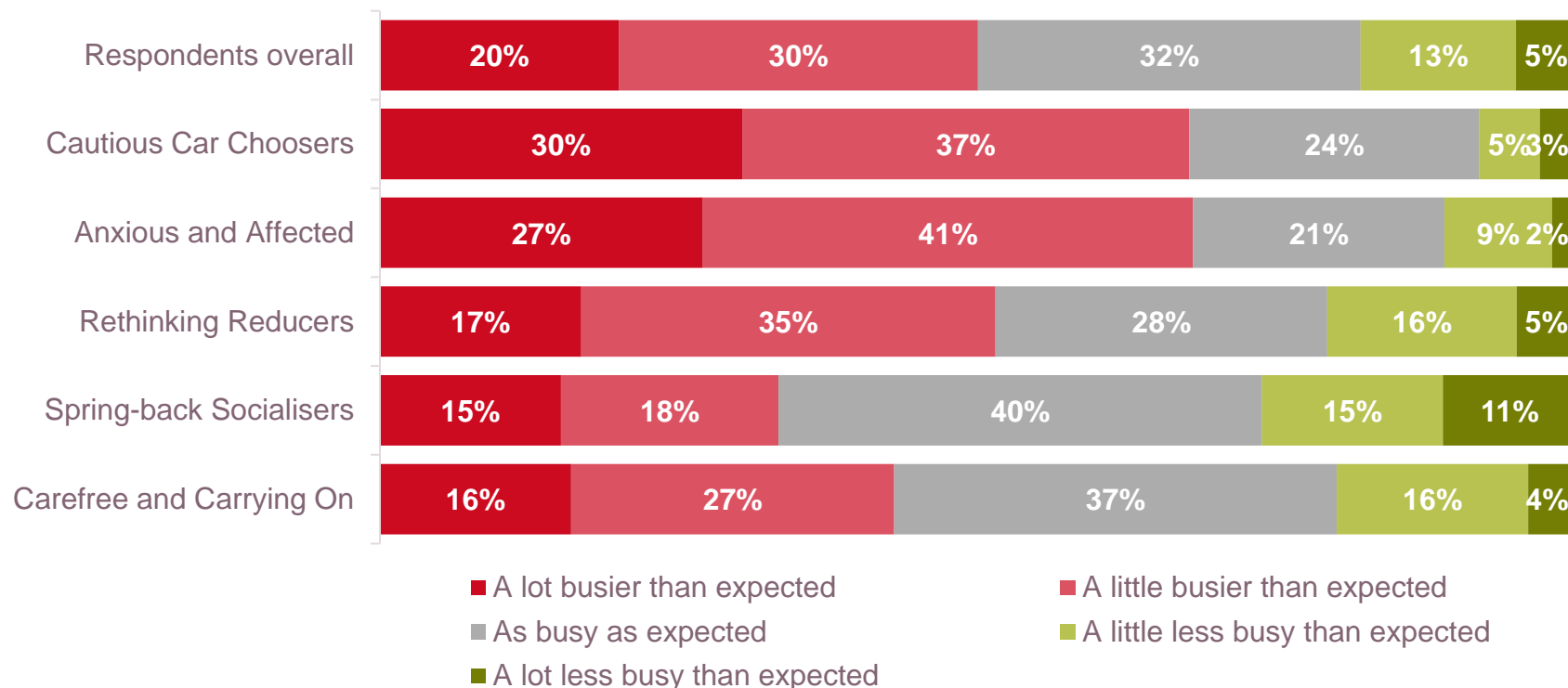
Base: Omnibus w49-w51 aggregated. Those who used a bus outside London between 28th May and 20th June 2021 (613).

Anxious and Affected (176), Rethinking Reducers (50), Spring-back Socialisers (140), Carefree and Carrying On (204)

* Denotes statistically significant difference from respondents overall. ^ **Caution – low base**

Those who are Anxious and Affected who have made a journey by train are more likely than others to have found it to be busier than they expected

On the last occasion that you made a journey by train was it...



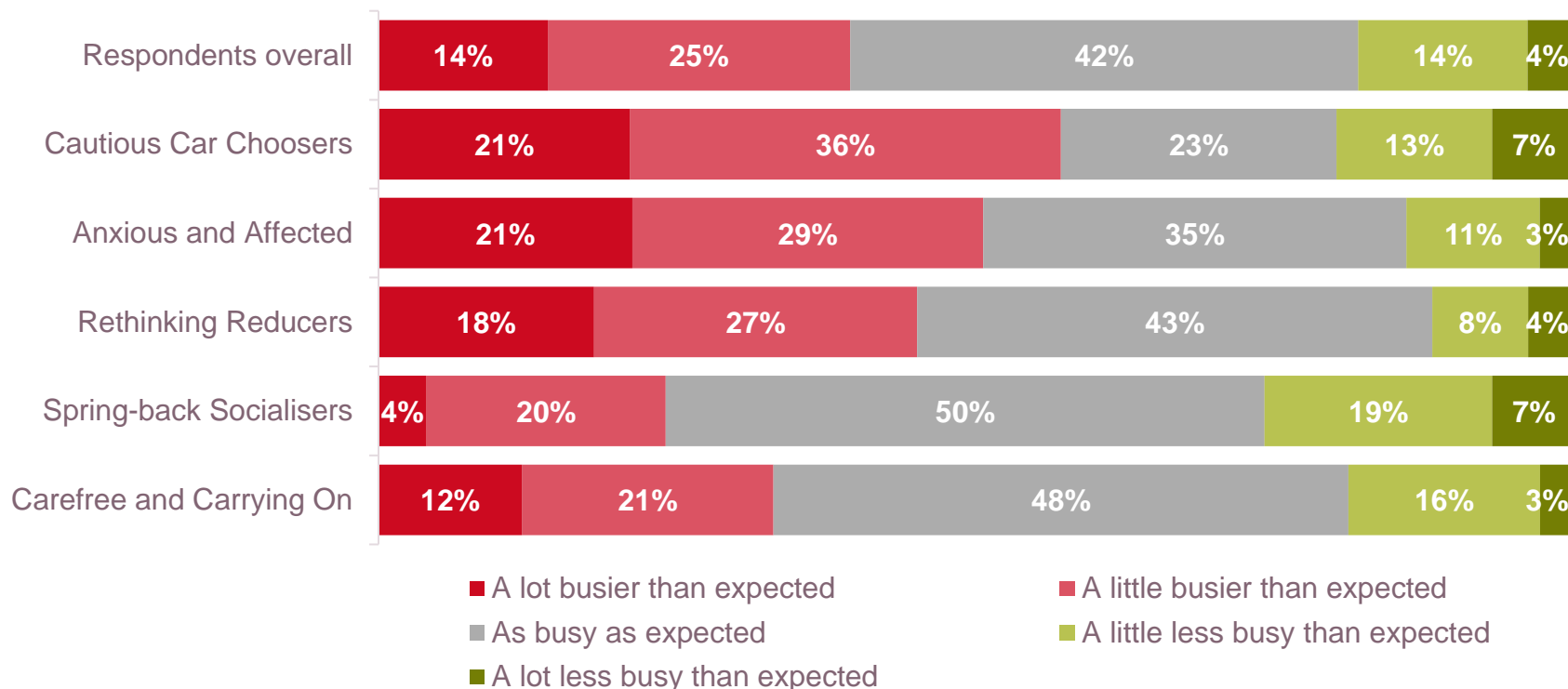
Base: Those making a journey by train. Omnibus w49-w51 aggregated (520).

Cautious Car Choosers (61), Anxious and Affected (121), Rethinking Reducers (50), Spring-back Socialisers (108), Carefree and Carrying On (176)

^ Caution – low base

Those who are Anxious and Affected and Cautious Car Choosers who have made a journey by bus are more likely than others to have found it to be busier than they expected

On the last occasion that you made a journey by bus was it...



Base: Those making a journey by bus. Omnibus w49-w51 aggregated (954).

Cautious Car Choosers (78), Anxious and Affected (277), Rethinking Reducers (80), Spring-back Socialisers (203), Carefree and Carrying On (309)

^ **Caution – low base**

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 50/51

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 50 / 51 | 4,042 | 958 | 619 | 381 | 893 | 1,079 | 112 |

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.