

# Covid-19 travel segmentation

16 July – 1 August analysis  
August 2021



# The more things change the more they stay the same?

This latest report shows how our five segments (see page 33) are feeling following significant relaxation of restrictions across Great Britain and the end of almost all legal restrictions in England on 19 July. Overall, there are few obvious signs of this change in the segments. As we expected, their attitudes and behaviours will take much longer to change.

The size of each of the segments remains a key measure to watch. While relatively stable in recent weeks it is worth remembering this has changed significantly since we began tracking the segments. The Carefree and Carrying On segment often appears to be an outlier in this report, but they have actually emerged as the biggest single segment, representing three in 10 of the population.

Face coverings remain the clearest dividing issue where the Carefree and Carrying On stand out. They are much less likely to have worn one on their most recent journey, with almost one in four reporting they didn't wear a face covering the last time they used a train. When asked about what they will do in future, just one in four of the Carefree and Carrying On say they will wear a face covering at all times even if it is not a requirement. On the other hand, a clear majority of the other segments plan to continue wearing a face covering. Operators seeking to encourage as many passengers as possible to continue wearing a face covering will need to consider how to ensure their communications 'land' with passengers in the Carefree and Carrying On segment.

(Continues on page 3)

# The more things change the more they stay the same?

The differences in journey satisfaction remain, with the Spring-back Socialisers the most satisfied overall with their rail and bus journeys. Part of the reason may be their journey purpose, with around seven in 10 Spring-back Socialisers mainly travelling by rail or bus for leisure purposes and relatively few travelling to work or education. This compares with around one in three of both the Anxious and Affected and Carefree and Carrying On segments mainly using the train to travel to work or education (slightly more than by bus). This similarity in journey purpose makes the significant differences in satisfaction all the more telling. While the Carefree and Carrying On are increasingly satisfied, with more than eight in 10 satisfied overall with their train or bus journeys, the trend in satisfaction amongst the Anxious and Affected has been going the opposite way, with only around two in three satisfied.

Our Travel during Covid-19 survey steps back to fortnightly during August, so our next segmentation analysis report will be published on 8 September. This report will show how each of the segments are feeling as the holiday period ends, schools return and more people may begin to return to workplaces. Could this be when the much discussed 'new normal' for transport will begin in earnest?

# 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.

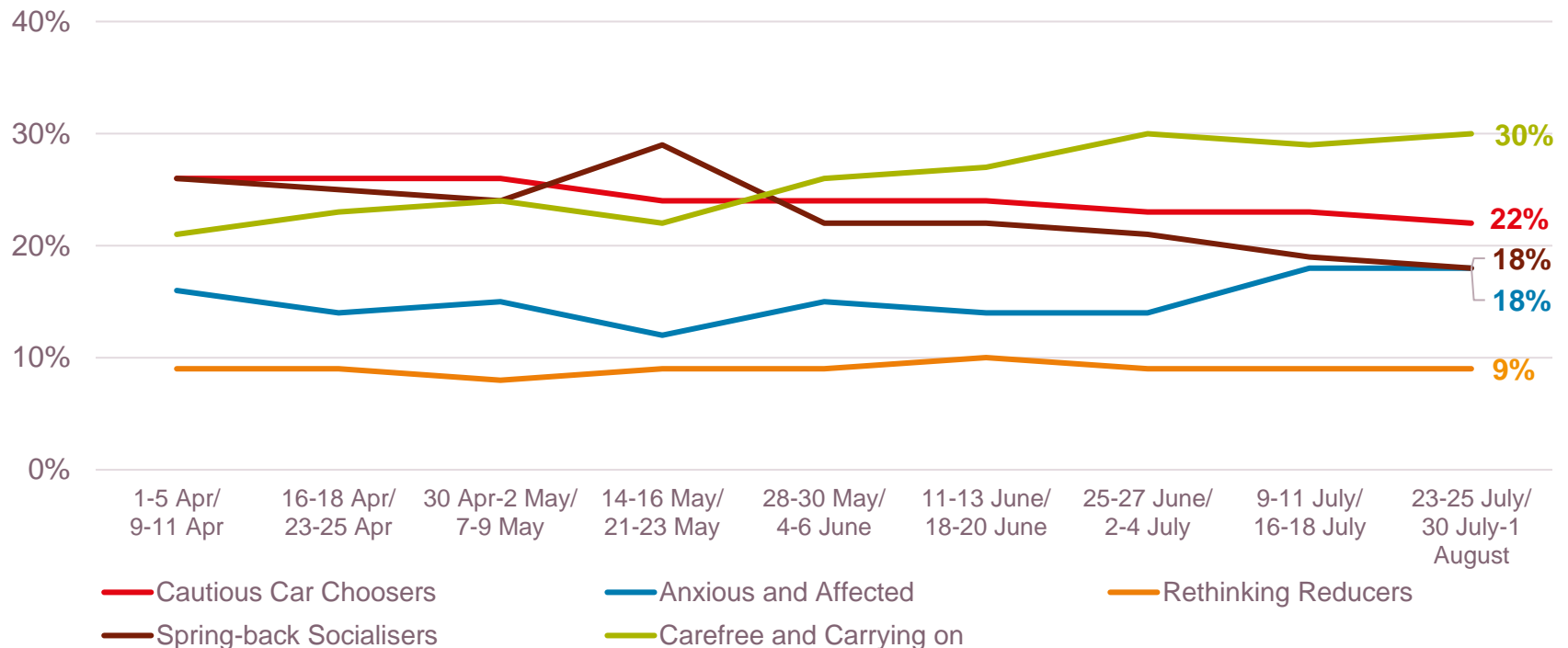
Fieldwork dates	Omnibus Waves
1-5 April / 9-11 April	W40 + W41
16-18 April / 23-25 April	W42 + W43
30 April – 2 May / 7-9 May	W44 + W45
14-16 May / 21-23 May	W46 + W47
28-30 May / 4-6 June	W48 + W49
11-13 June / 18-20 June	W50 + W51
25-27 June / 2-4 July	W52 + W53
9-11 July / 16-18 July	W54 + W55
23-25 July / 30 July-1 August	W56 + W57

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.

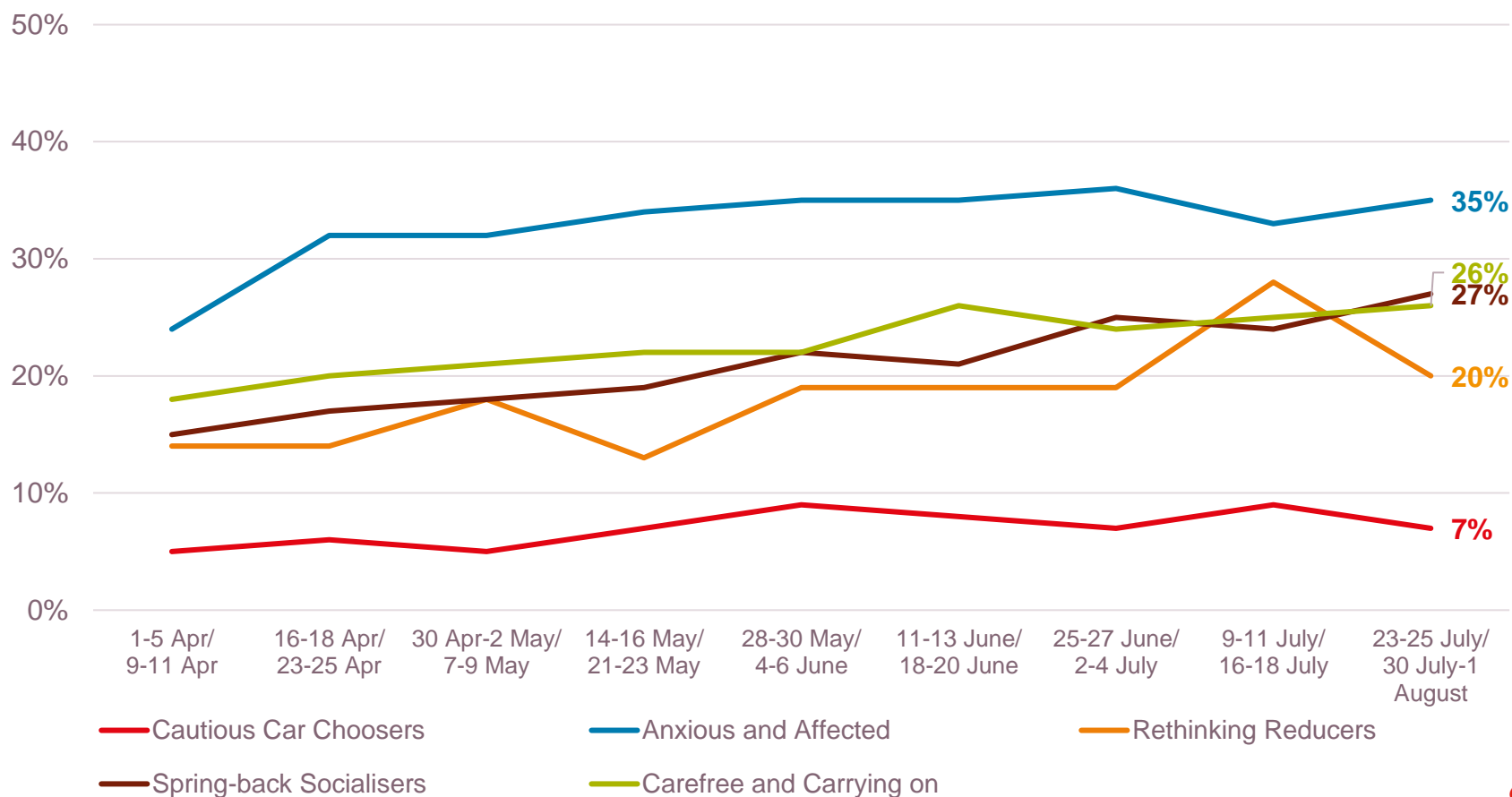
## Segment size\*



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

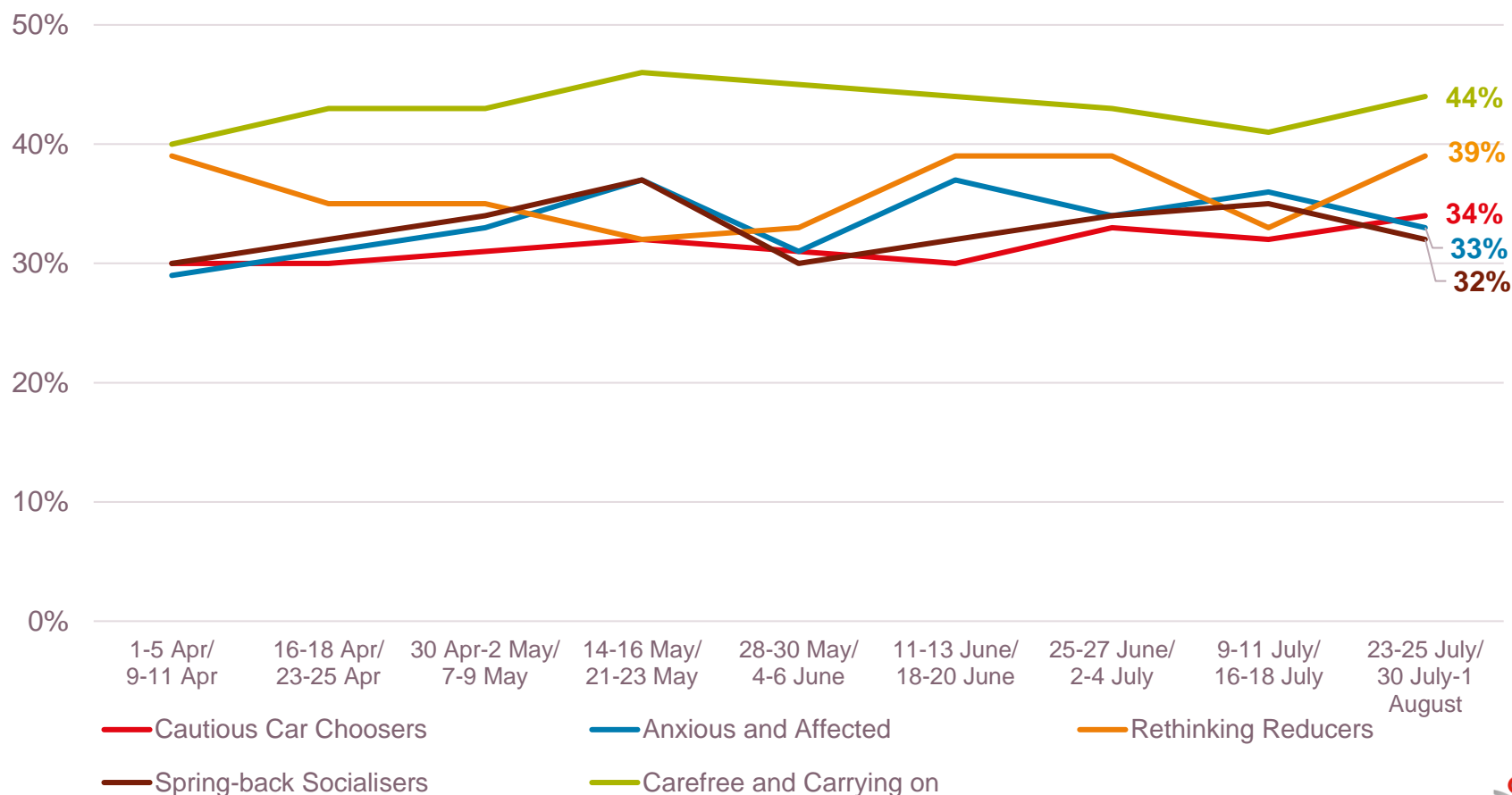
**The Anxious and Affected segment are more likely than others to have used public transport in the last seven days. Increasing proportions of those who are Carefree and Carrying On and Spring-back Socialisers are doing the same.**

### Use of public transport in the last seven days



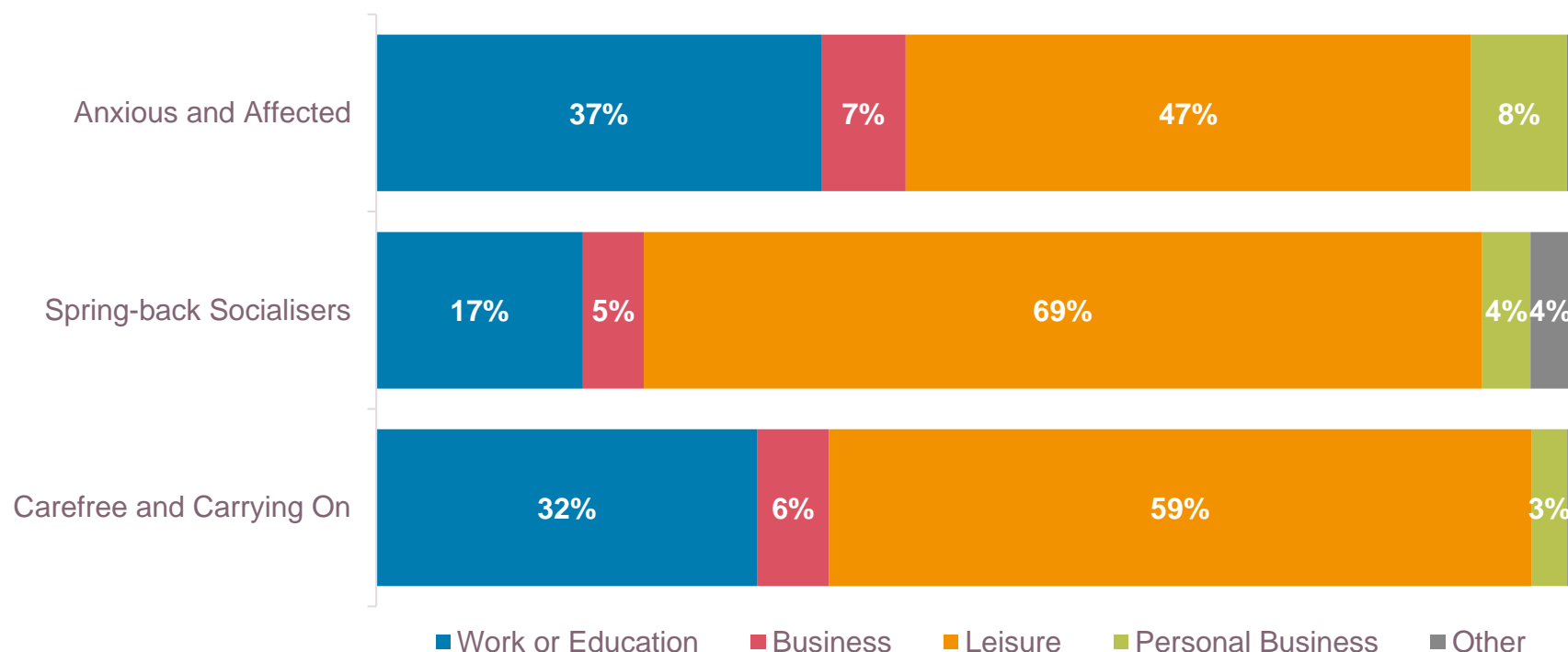
## The Carefree and Carrying on segment continue to be more likely than others to be making journeys to or from work in the last seven days

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



**Those who are Anxious and Affected are more likely to have made journeys to work by train. Spring-back Socialisers are more likely to have made journeys by train for leisure reasons.**

Over the last seven days, when you travelled by train, which of the following best describes the main reason for which you made these journeys?



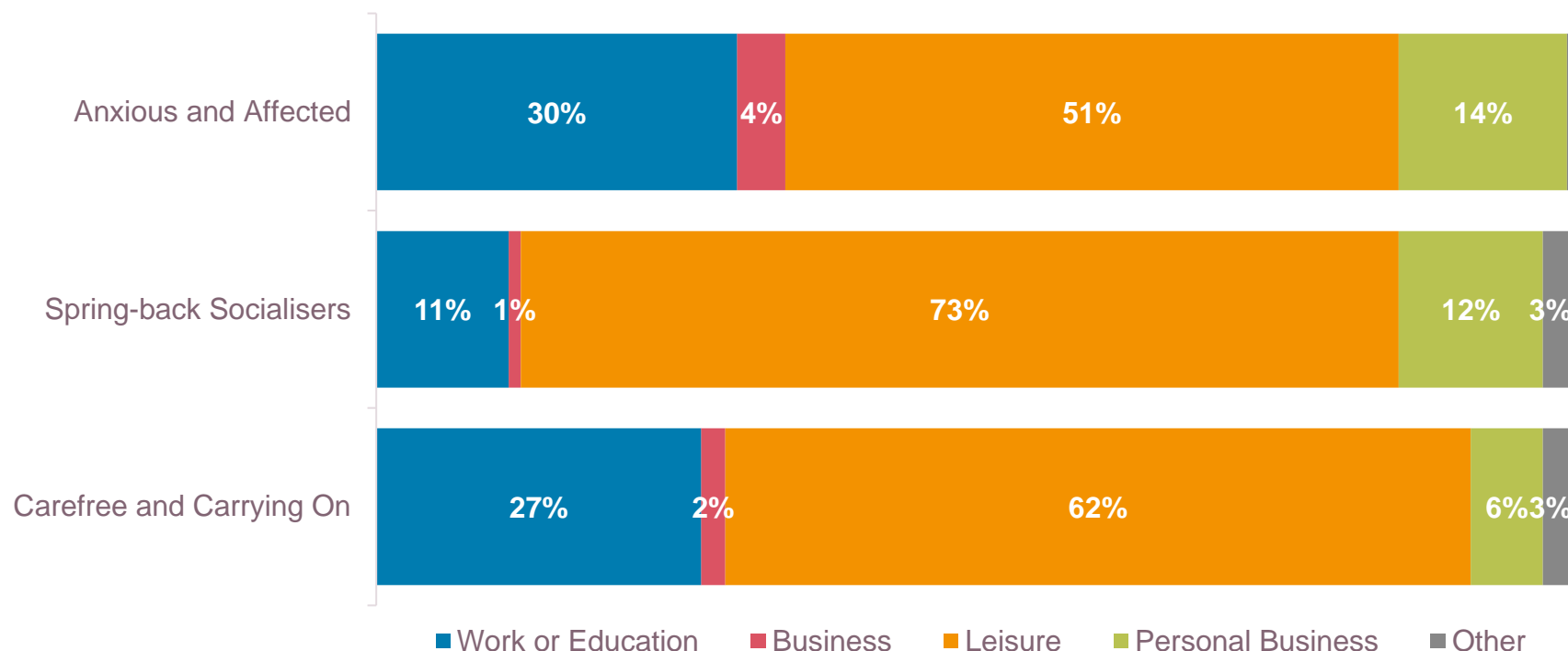
Base: Those making a journey by train. Omnibus w56-w57 aggregated. Anxious and Affected (95), Spring-back Socialisers (59), Carefree and Carrying On (149).

Cautious Car Choosers and Rethinking Reducers removed from analysis as less than 50 responses.



## Those who are Anxious and Affected are more likely than others to have made journeys to work by bus

Over the last seven days, when you travelled by bus, which of the following best describes the main reason for which you made these journeys?

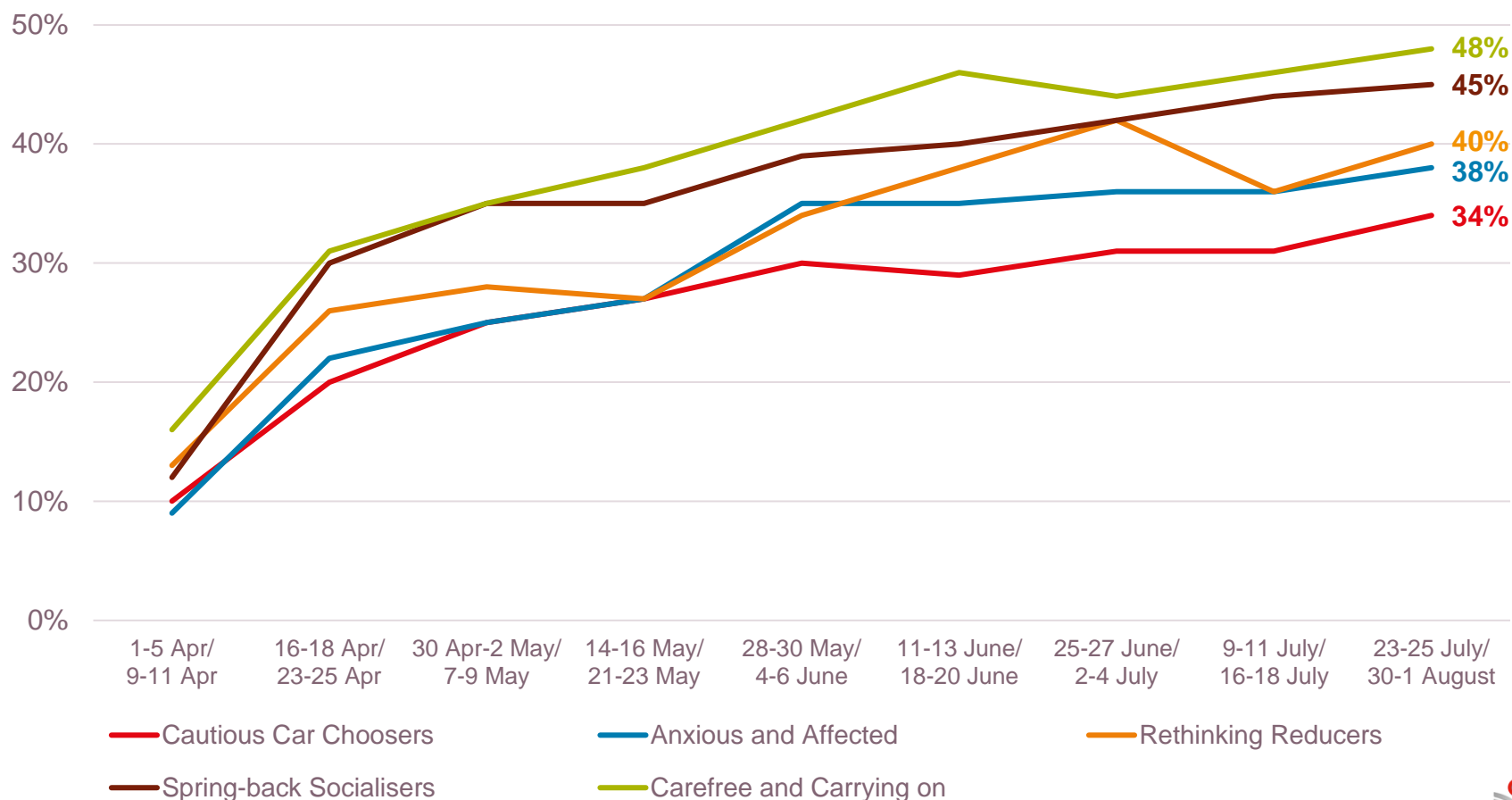


Base: Those making a journey by bus outside London. Omnibus w56-w57 aggregated. Anxious and Affected (128), Spring-back Socialisers (109), Carefree and Carrying On (154).

Cautious Car Choosers and Rethinking Reducers removed from analysis as less than 50 responses.

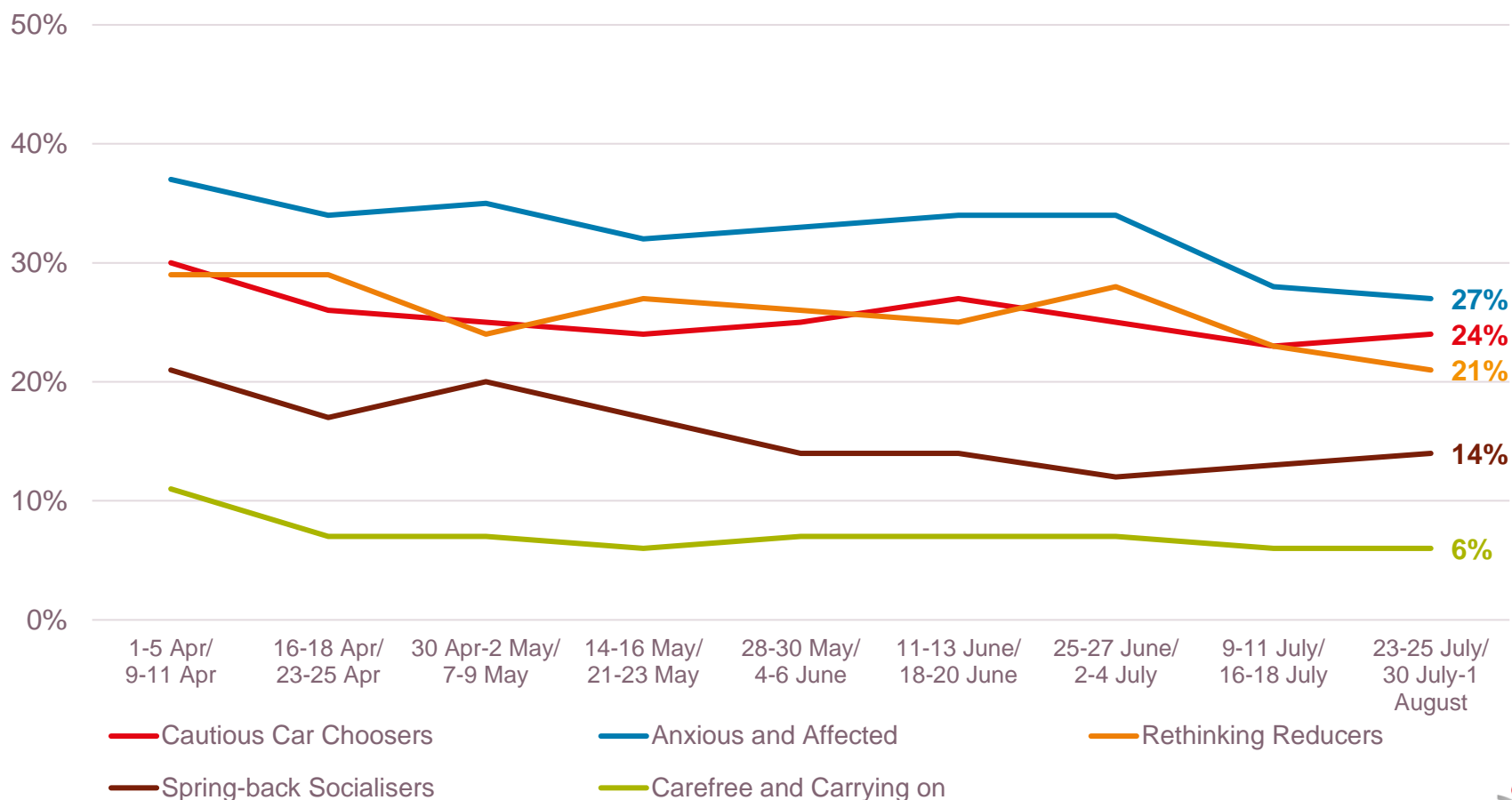
## The Carefree and Carrying on segment and the Spring-back Socialisers are more likely than others to be making journeys for leisure reasons

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



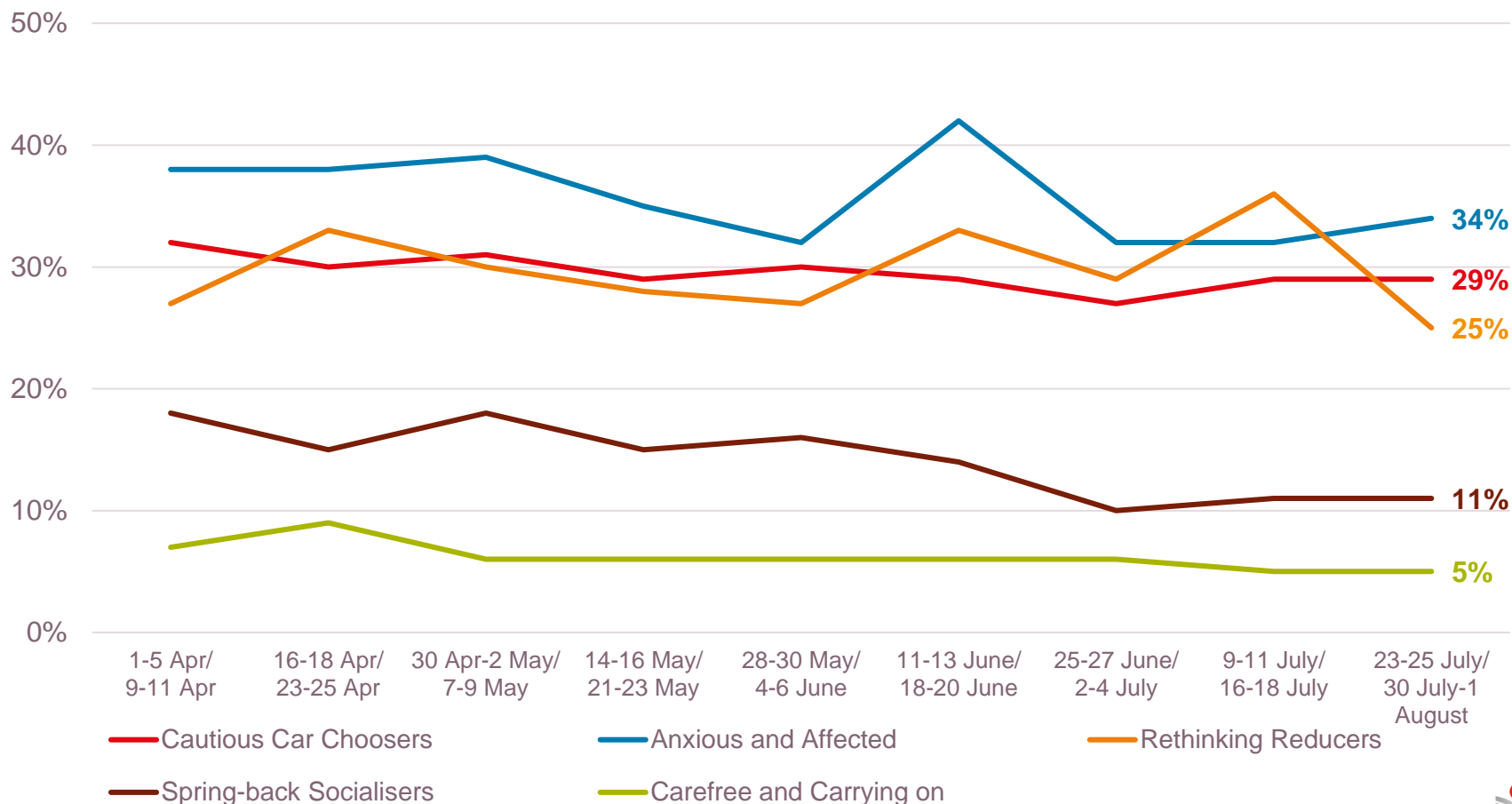
## The proportion of those who are avoiding using public transport is falling across all segments, but perhaps more rapidly among those who are Anxious and Affected

Proportions avoiding using public transport



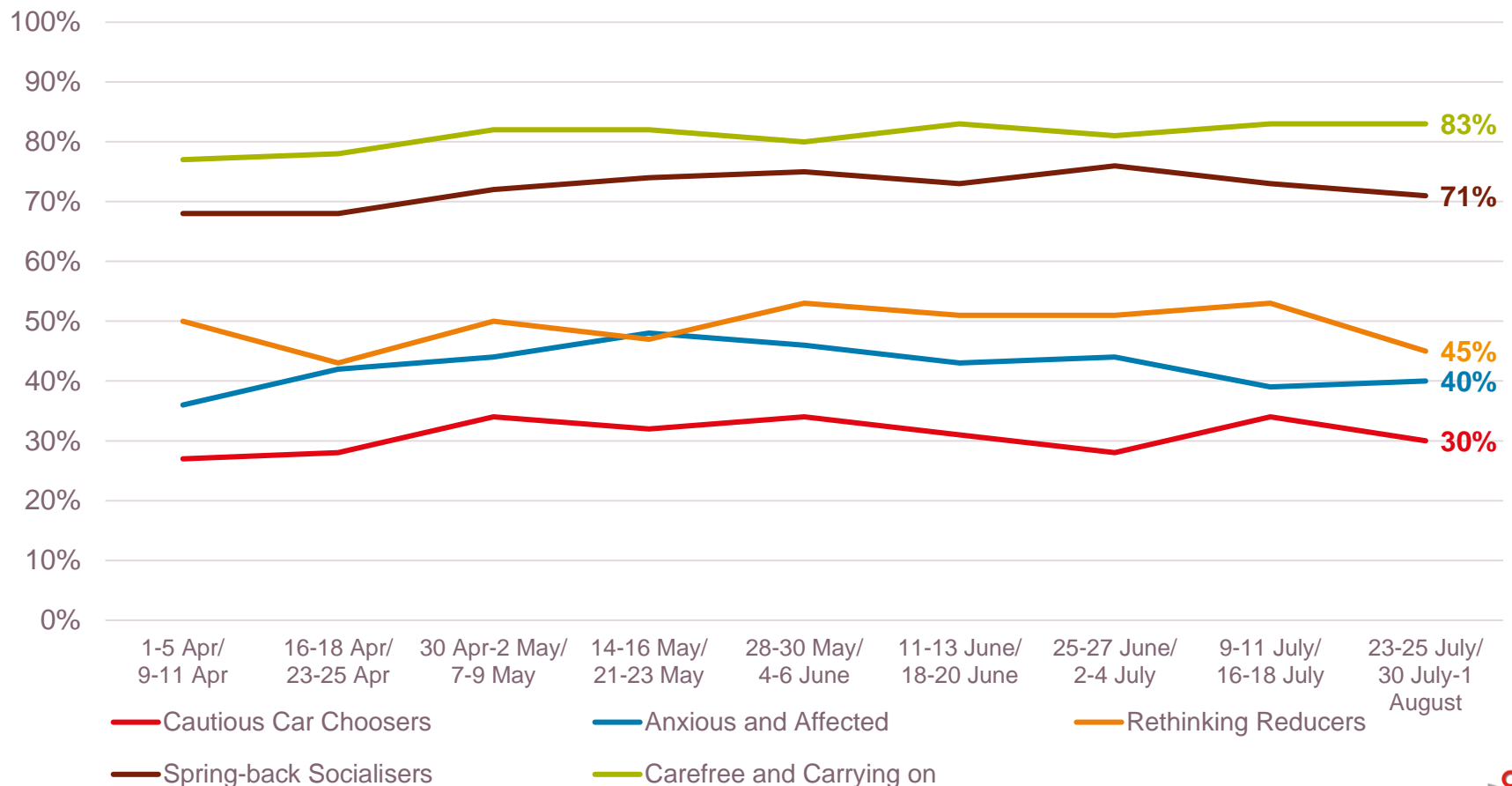
## Across many of the segments the proportion of those who are not using public transport because they think it is not safe to do so is falling marginally

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



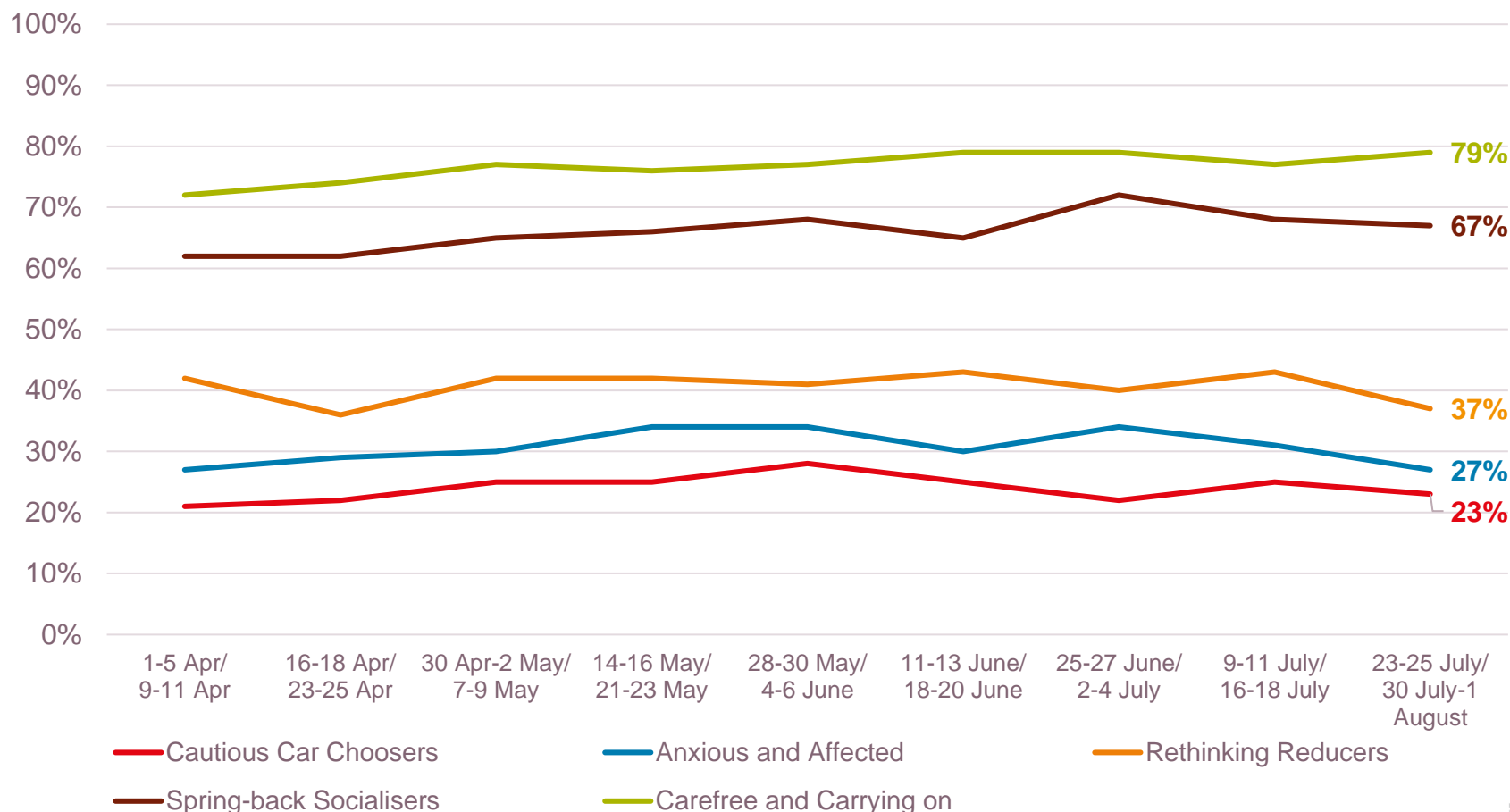
**Among those who have not used a train in the last seven days, those who are Carefree and Carrying on, and those who are Spring-back Socialisers are more likely than others to say that they would feel safe to do so**

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



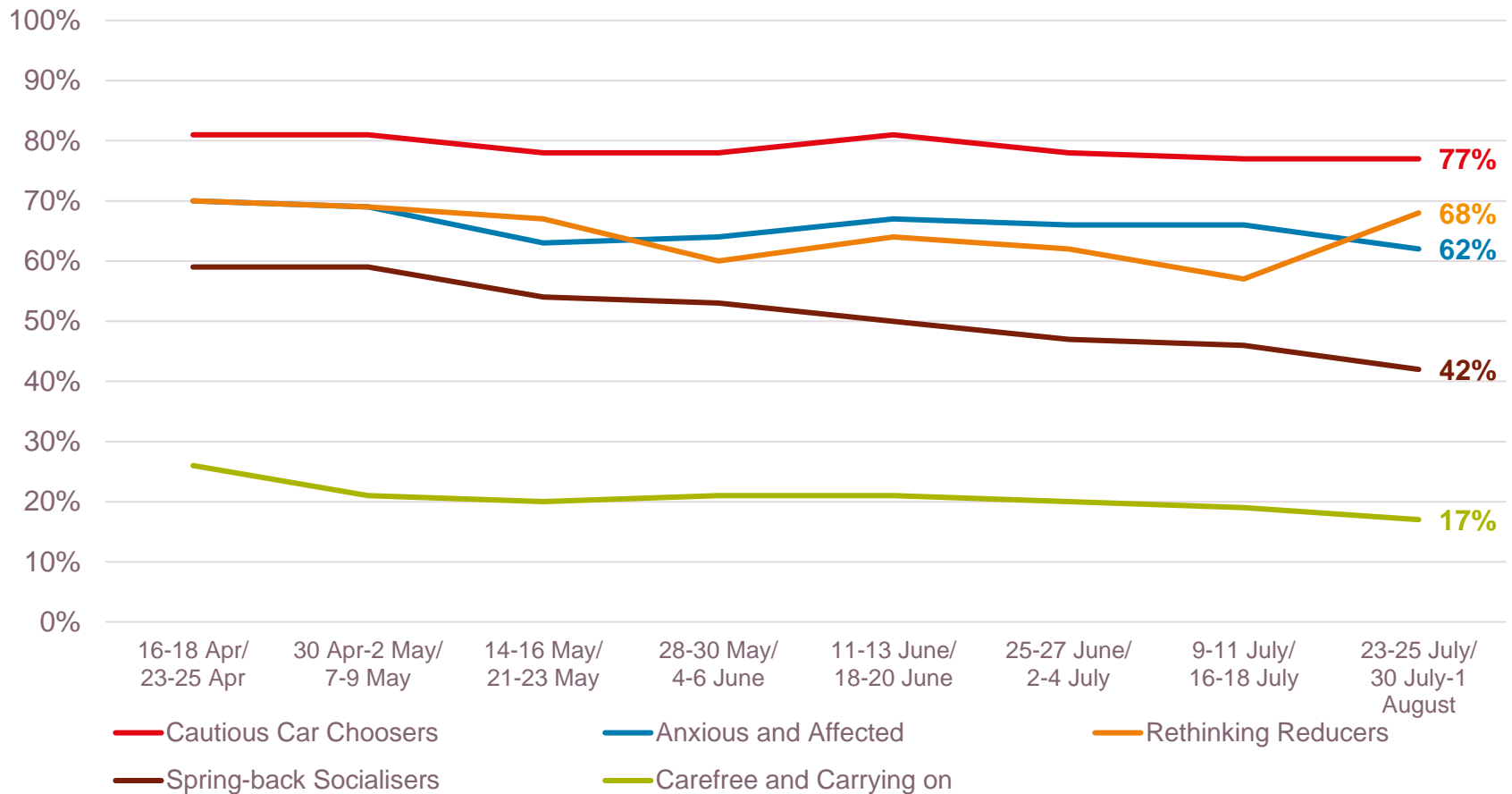
## The proportion of those who say that they would feel safe making a journey by bus is higher among those who are Carefree and Carrying On and Spring-back Socialisers

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



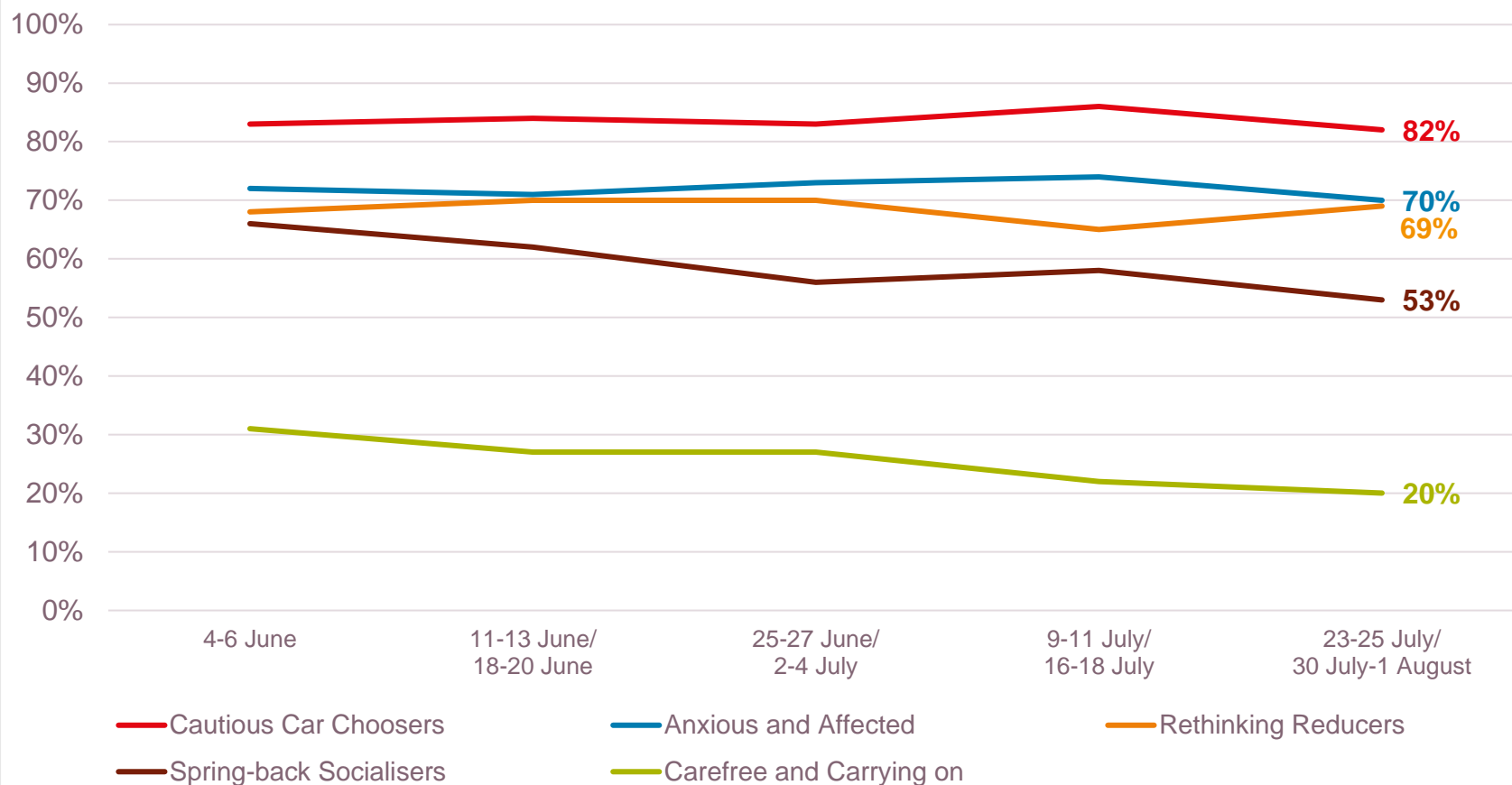
## The proportion of those who agree that they won't use public transport unless social distancing is in place has increased recently among Rethinking Reducers

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



**There has also been an small increase in the proportion of Rethinking Reducers who agree that they won't use public transport unless passengers are required to wear face coverings**

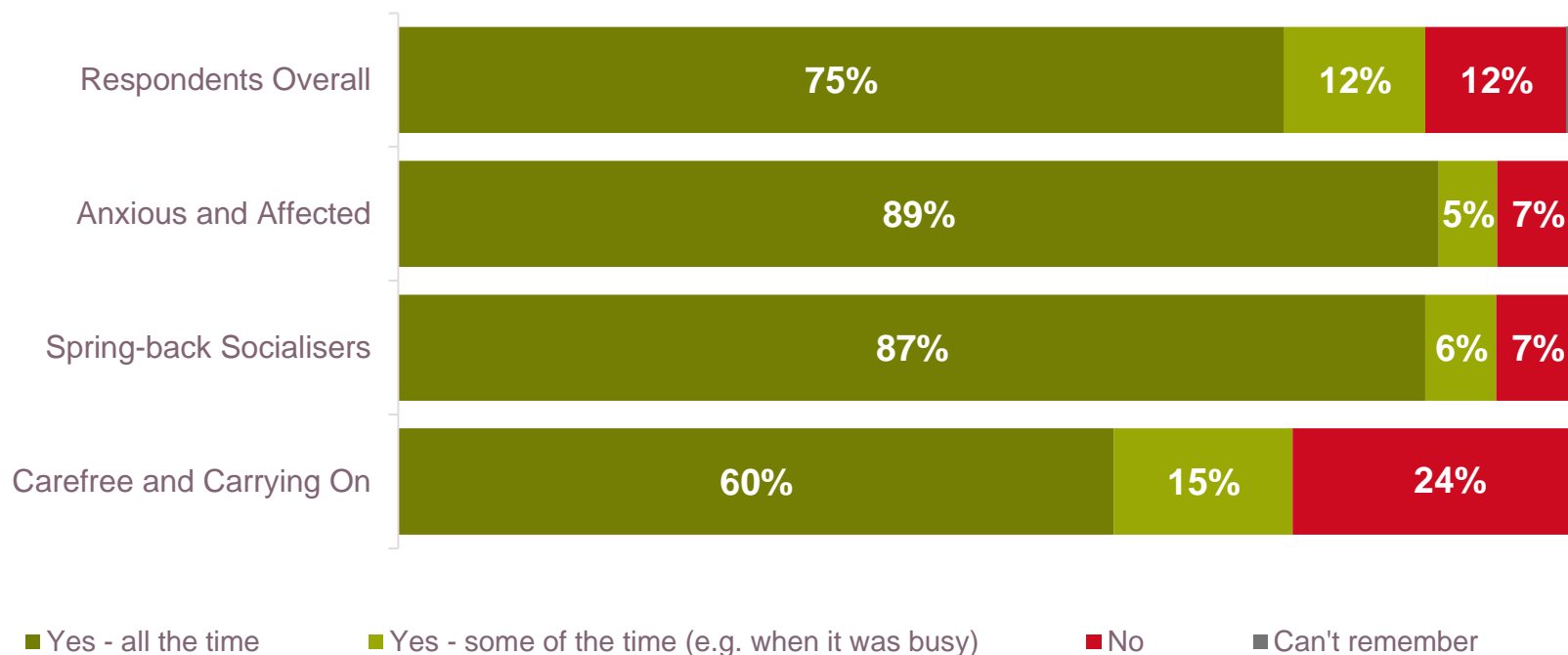
**'I won't use public transport unless passengers are required to wear face coverings' (% 'agree')**





## Those who are Carefree and Carrying On are less likely than others to have worn a face covering on the last occasion that they used a train

On your most recent train journey did you wear a face covering?

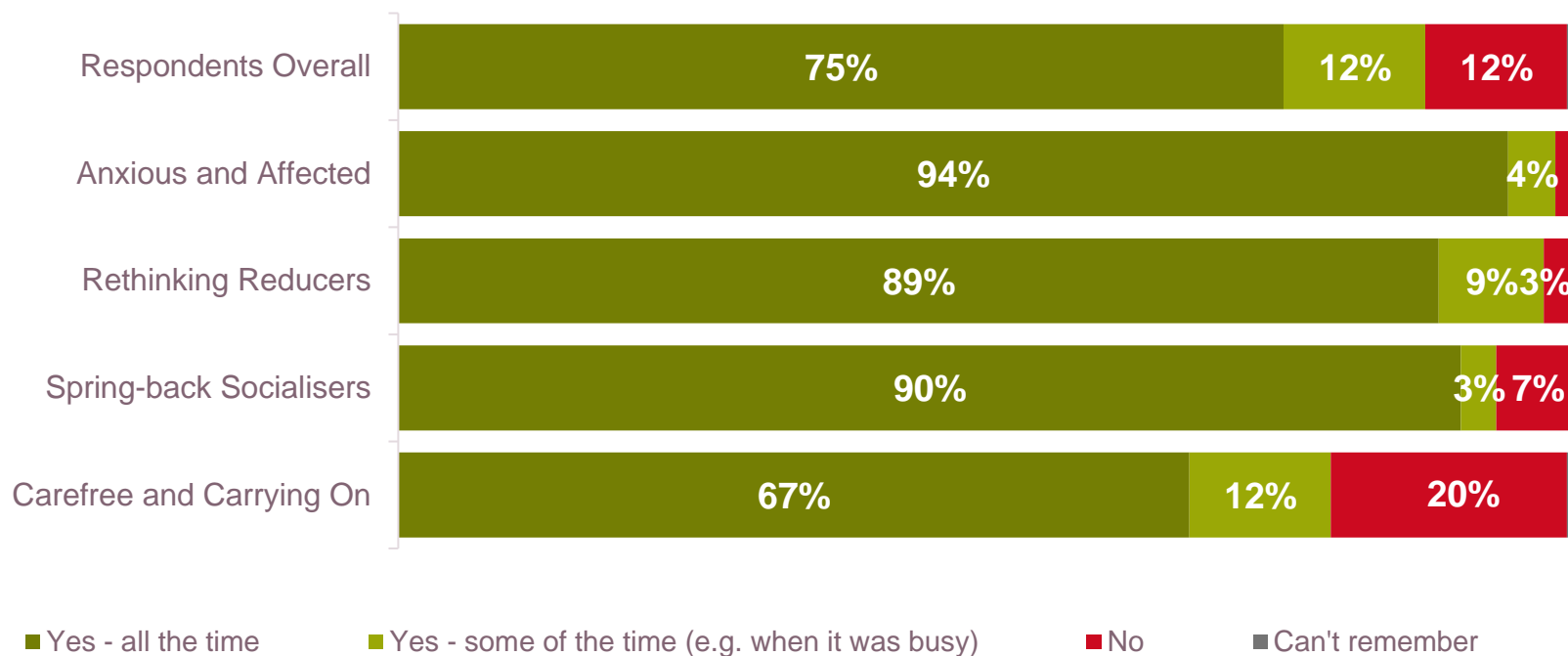


Base: Those making a journey by train. Omnibus w56-w57 aggregated (365). Anxious and Affected (95), Spring-back Socialisers (59), Carefree and Carrying On (149).

Cautious Car Choosers and Rethinking Reducers removed from analysis as less than 50 responses.

## Those who are Carefree and Carrying On are less likely than others to have worn a face covering on the last occasion that they used a bus

On your most recent bus journey did you wear a face covering?

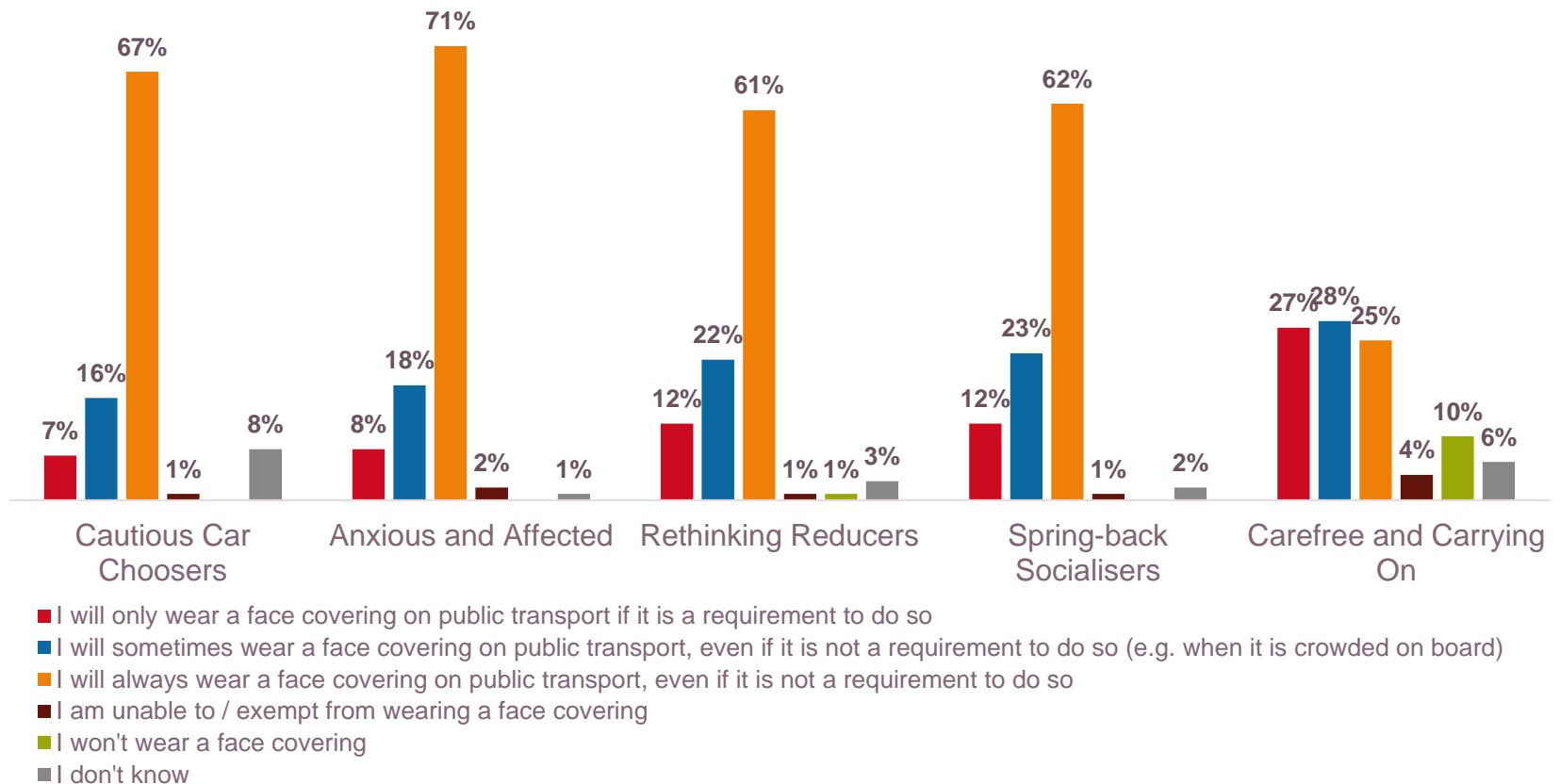


Base: Those making a journey by bus outside London. Omnibus w56-w57 aggregated (696). Anxious and Affected (206), Rethinking Reducers (61), Spring-back Socialisers (142), Carefree and Carrying On (243).

Cautious Car Choosers and Rethinking Reducers removed from analysis as less than 50 responses.

## Those who are Carefree and Carrying On have more mixed views about their likely future use of face coverings on public transport than other groups

Thinking about your future use of public transport, which of the following statements best applies to you..?



Base: Omnibus w56 only. Cautious Car Choosers (458), Anxious and Affected (376), Rethinking Reducers (173), Spring-back Socialisers (351), Carefree and Carrying On (611)

# Satisfaction with aspects of train and bus journeys by segment

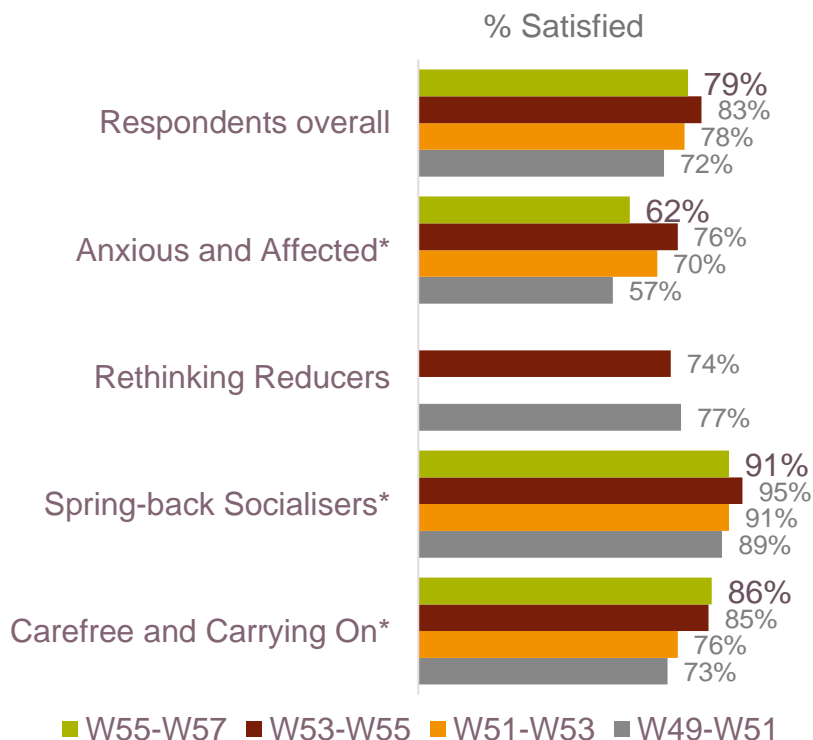
The section of the report below contains an analysis of the differing levels of satisfaction with various aspects of train and bus journeys between segments. Unlike elsewhere in this report, these findings are presented in terms of three waves of aggregated omnibus data. The most recent data combines waves 55, 56 and 57 which cover train and bus journeys made between 9 July and 1 August 2021. Data for previous aggregated waves of research are also shown in these charts.

In the most recent time period small numbers of 'Cautious Car Choosers' (who are less likely than other groups to use public transport) and Rethinking Reducers made a journey by train or by bus, and are therefore the results for these segments are excluded from the analysis.

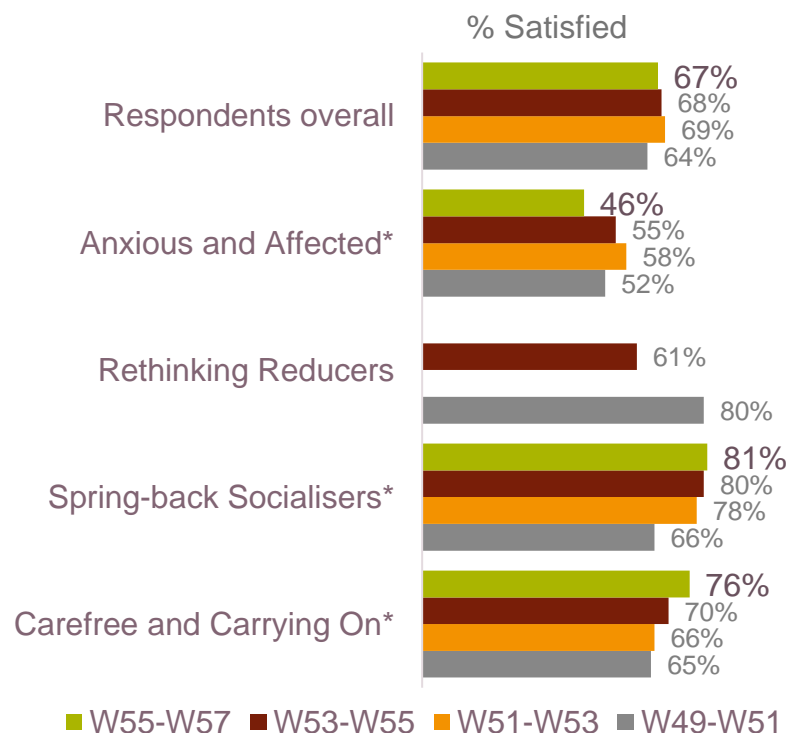
**Spring-back Socialisers are more likely than others to be satisfied with their train journey overall and the behaviour of other passengers. Those who are Anxious and Affected are least likely to be satisfied.**

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

### Overall satisfaction



### Other passenger behaviour



Base: Omnibus w55-w57 aggregated. Those who used a train between 9<sup>th</sup> July – 1<sup>st</sup> August 2021 (540).

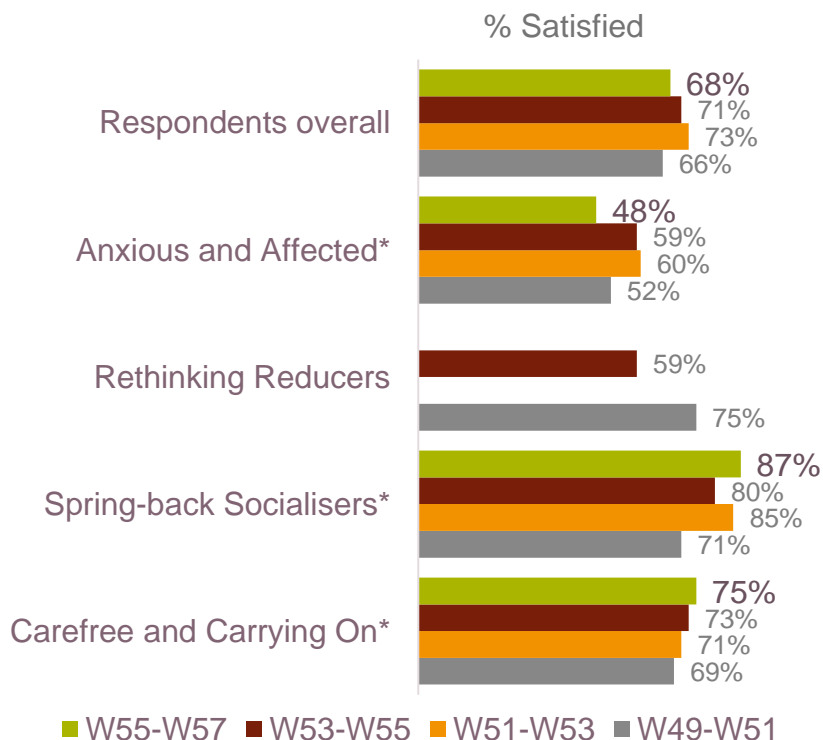
Anxious and Affected (155), Spring-back Socialisers (91), Carefree and Carrying On (192)

\* Denotes statistically significant difference from respondents overall.

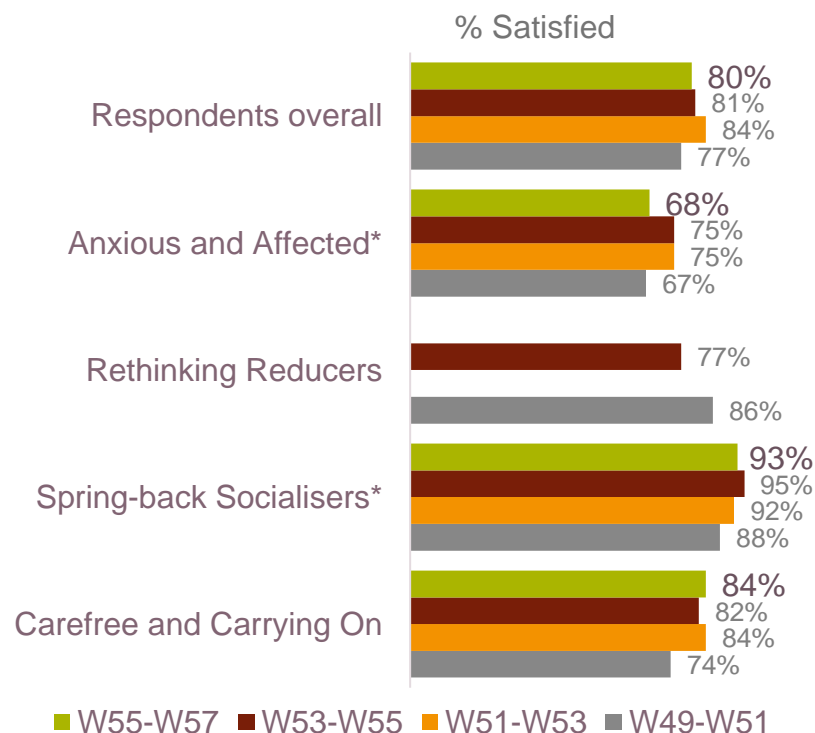
**Spring-back Socialisers are more likely than others to be satisfied with the number of people wearing face coverings and the cleanliness of the train. Those who are Anxious and Affected are least likely to be satisfied.**

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

### Number of people wearing face coverings



### Cleanliness



Base: Omnibus w55-w57 aggregated. Those who used a train between 9<sup>th</sup> July – 1<sup>st</sup> August 2021 (540).

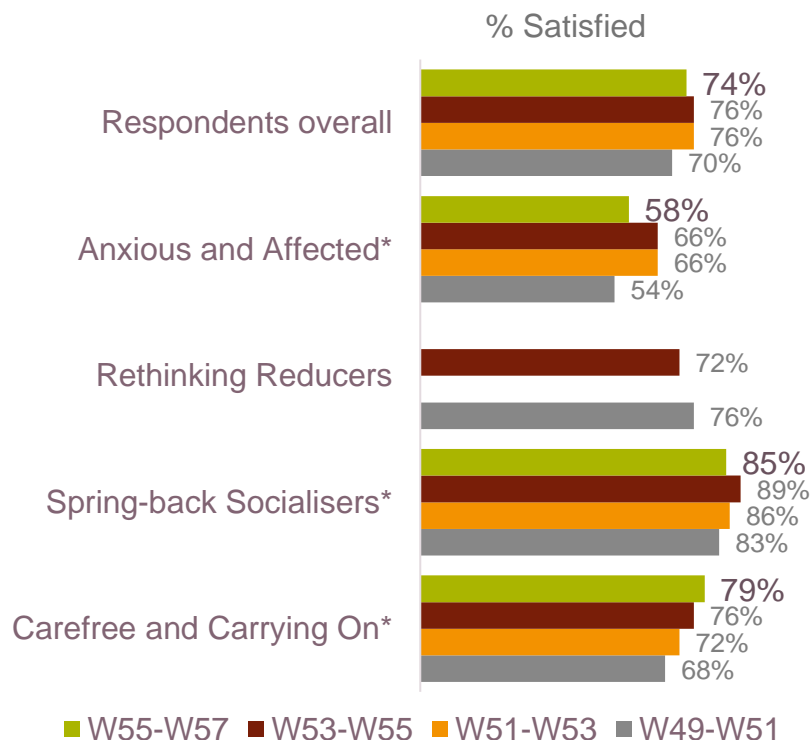
Anxious and Affected (155), Spring-back Socialisers (91), Carefree and Carrying On (192)

\* Denotes statistically significant difference from respondents overall.

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

## 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 w55-w57 aggregated. Those who used a train between 9<sup>th</sup> July – 1<sup>st</sup> August 2021 (540).

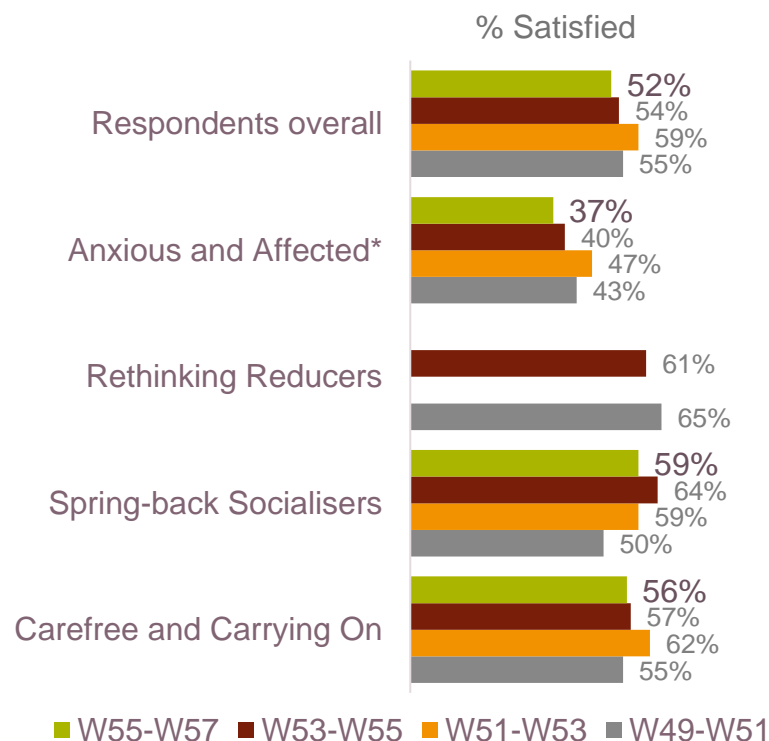
Anxious and Affected (155), Spring-back Socialisers (91), Carefree and Carrying On (192)

\* Denotes statistically significant difference from respondents overall.

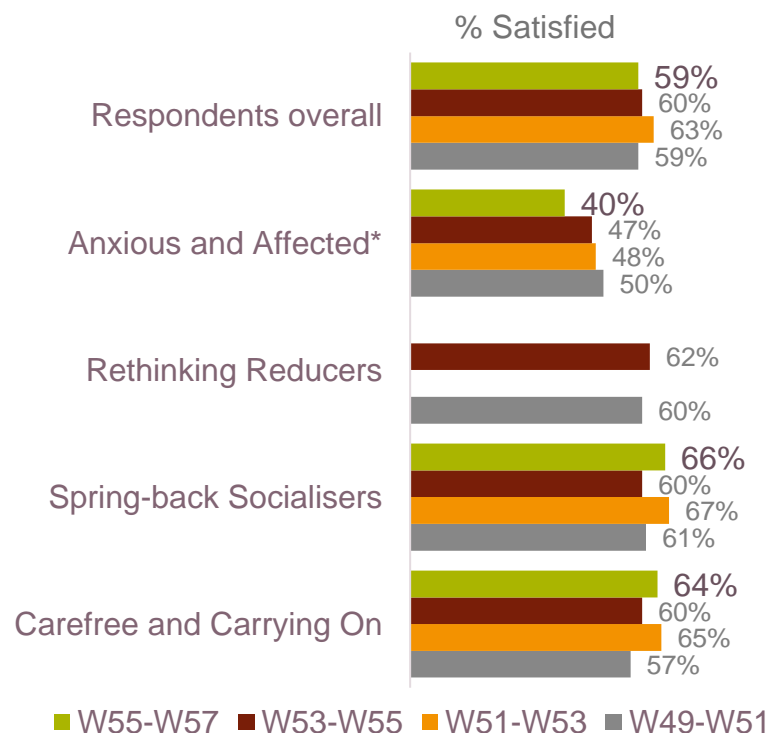
**Those who are Anxious and Affected are least likely than others to be satisfied with the ease of finding out how busy the train service would be and also with how the staff helped them to feel safe during the journey.**

## 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 w55-w57 aggregated. Those who used a train between 9<sup>th</sup> July – 1<sup>st</sup> August 2021 (540).

Anxious and Affected (155), Spring-back Socialisers (91), Carefree and Carrying On (192)

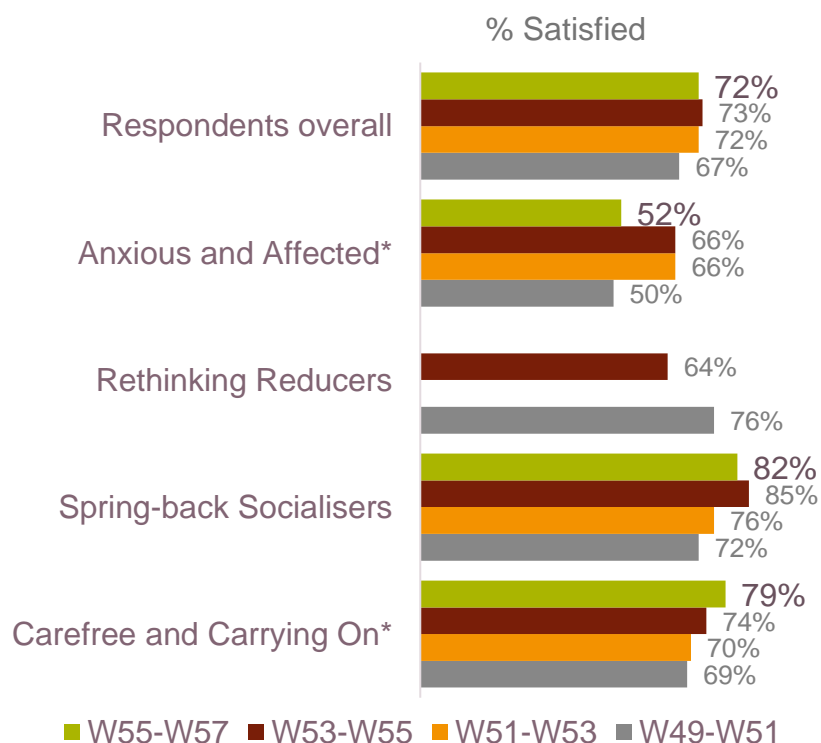
\* Denotes statistically significant difference from respondents overall.



## 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 w55-w57 aggregated. Those who used a train between 9<sup>th</sup> July – 1<sup>st</sup> August 2021 (540).

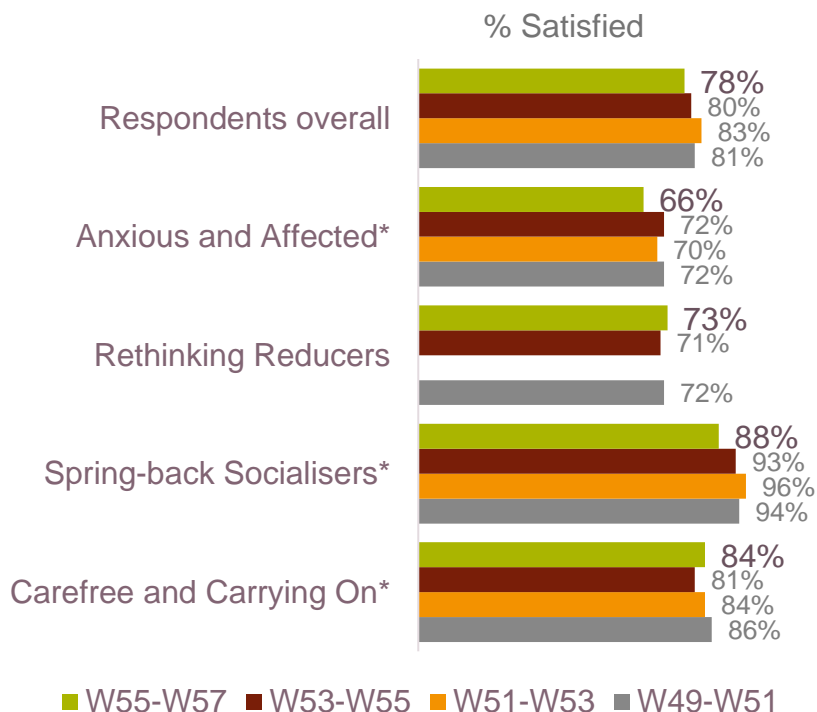
Anxious and Affected (155), Spring-back Socialisers (91), Carefree and Carrying On (192)

\* Denotes statistically significant difference from respondents overall.

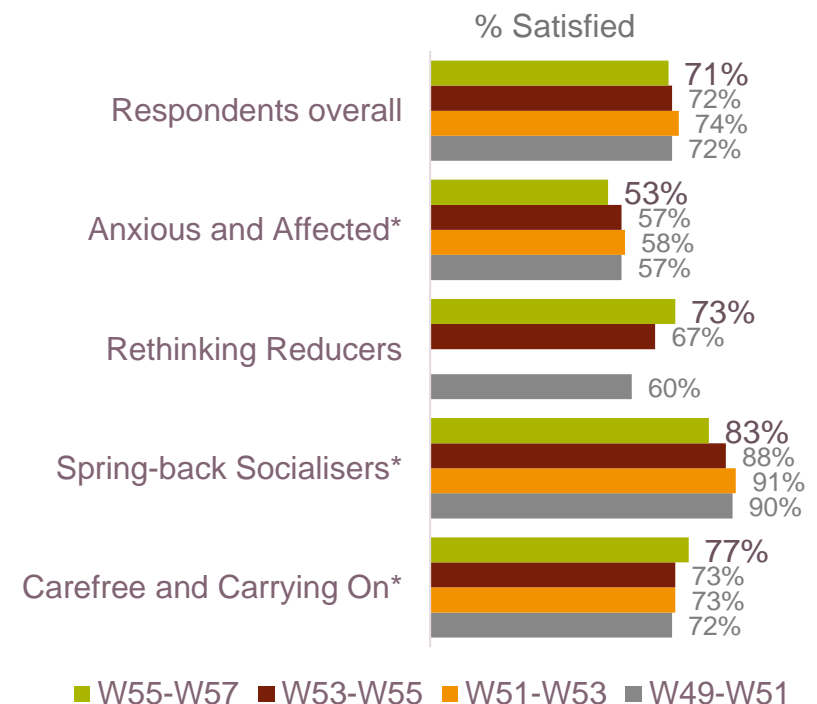
**Spring-back Socialisers are more likely than others to be satisfied with bus journey overall, and to be satisfied with the behaviour of other passengers. Those who are Anxious and Affected are the least likely to be satisfied.**

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

### Overall satisfaction



### Other passenger behaviour



Base: Omnibus w55-w57 aggregated. Those who used a bus outside London between 9<sup>th</sup> July – 1<sup>st</sup> August 2021 (695).

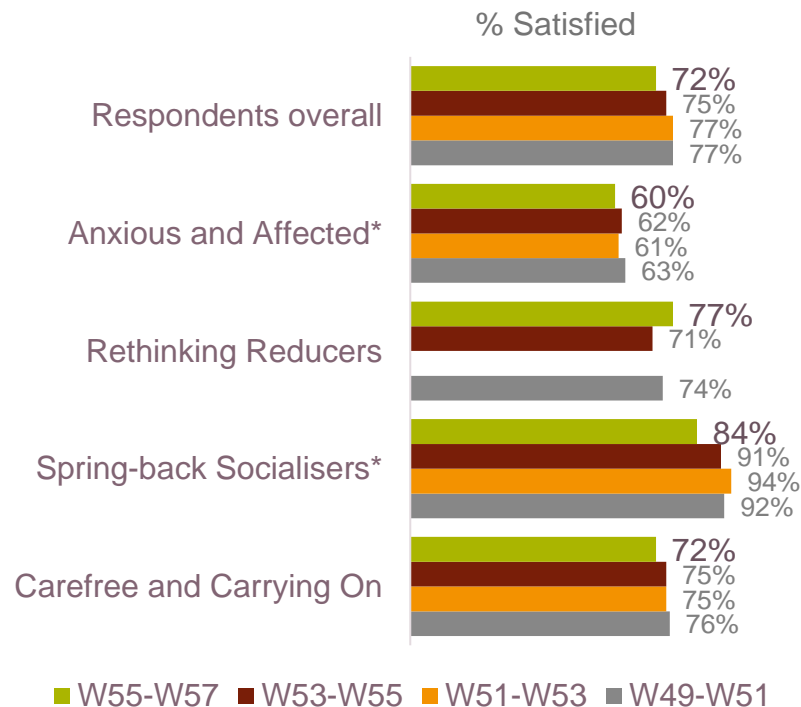
Anxious and Affected (202), Rethinking Reducers (63), Spring-back Socialisers (159), Carefree and Carrying On (235)

\* Denotes statistically significant difference from respondents overall.

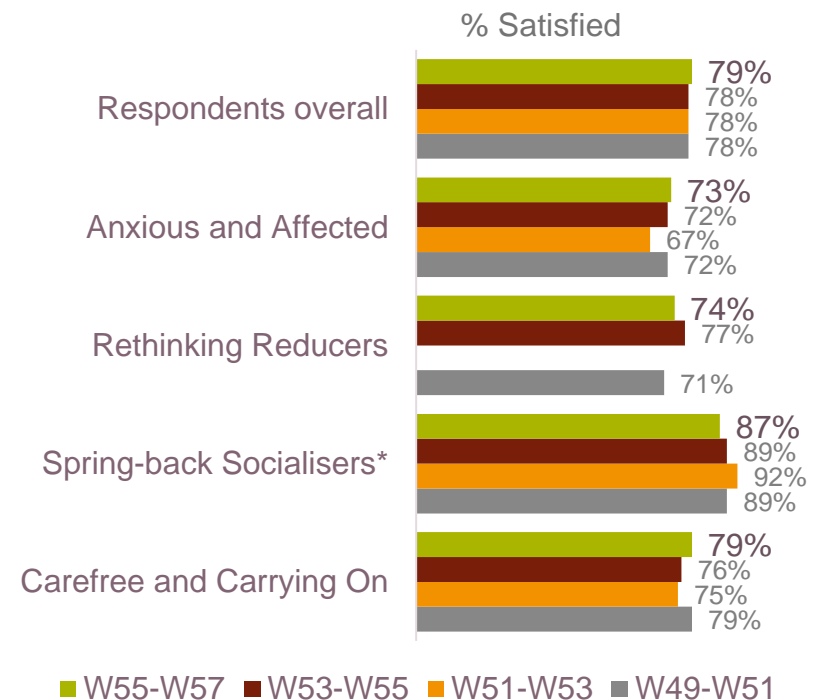
**Spring-back Socialisers are more likely than others to be satisfied with the number of people wearing face coverings, and to be satisfied with the cleanliness of the bus. Those who are Anxious and Affected are the least likely to be satisfied.**

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

### Number of people wearing face coverings



### Cleanliness



Base: Omnibus w55-w57 aggregated. Those who used a bus outside London between 9<sup>th</sup> July – 1<sup>st</sup> August 2021 (695).

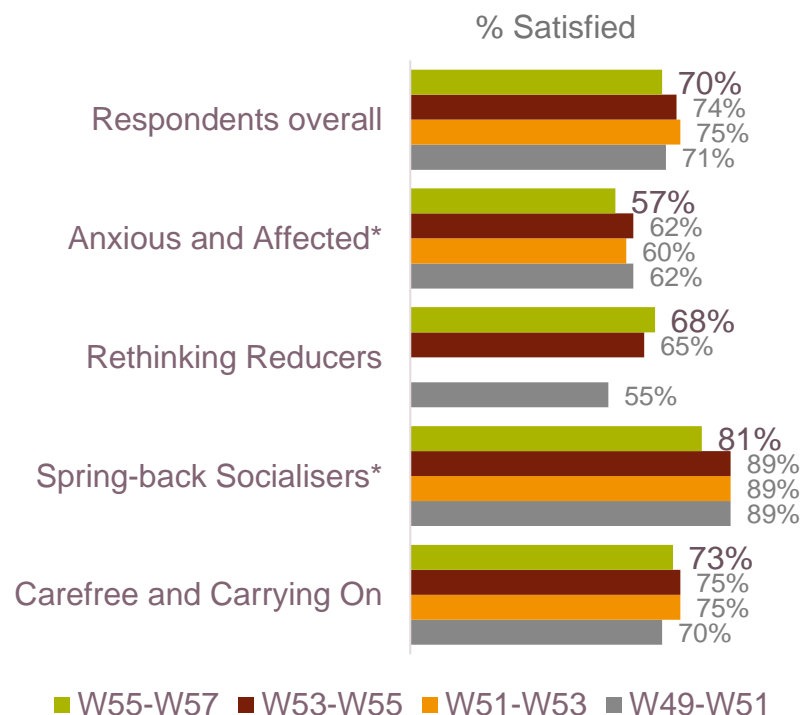
Anxious and Affected (202), Rethinking Reducers (63), Spring-back Socialisers (159), Carefree and Carrying On (235)

\* Denotes statistically significant difference from respondents overall.

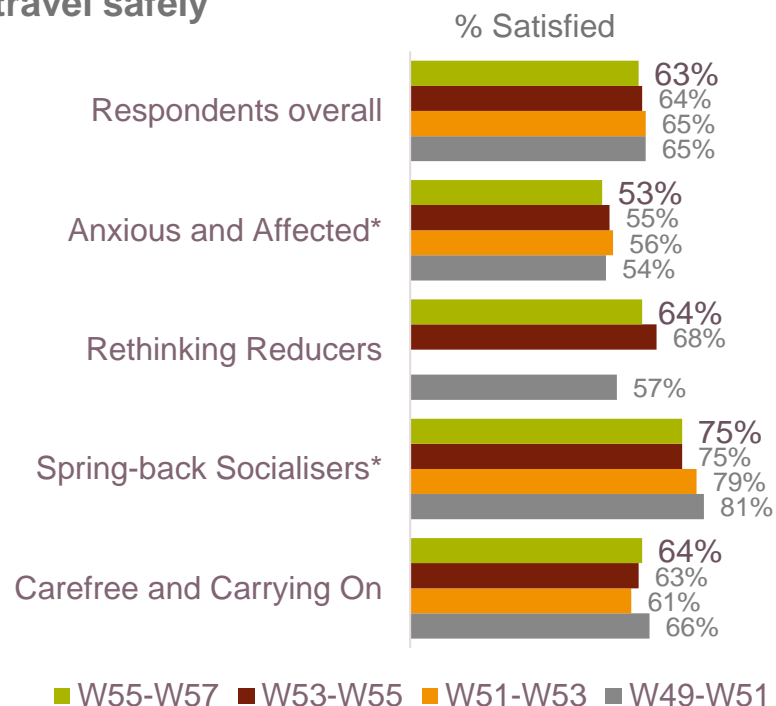
**Spring-back Socialisers are more likely than others to be satisfied with the ability to keep a safe distance and with what the operator did to help passengers to travel safely. Those who are Anxious and Affected are the least likely to be satisfied.**

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

### The ability to keep a safe distance



### What the operator did to help passengers to travel safely



Base: Omnibus w55-w57 aggregated. Those who used a bus outside London between 9<sup>th</sup> July – 1<sup>st</sup> August 2021 (695).

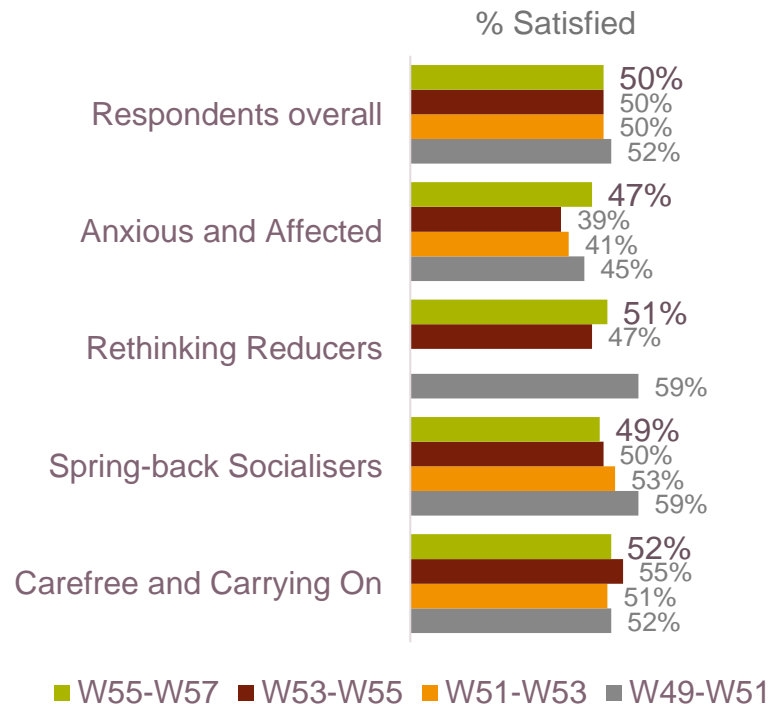
Anxious and Affected (202), Rethinking Reducers (63), Spring-back Socialisers (159), Carefree and Carrying On (235)

\* Denotes statistically significant difference from respondents overall.

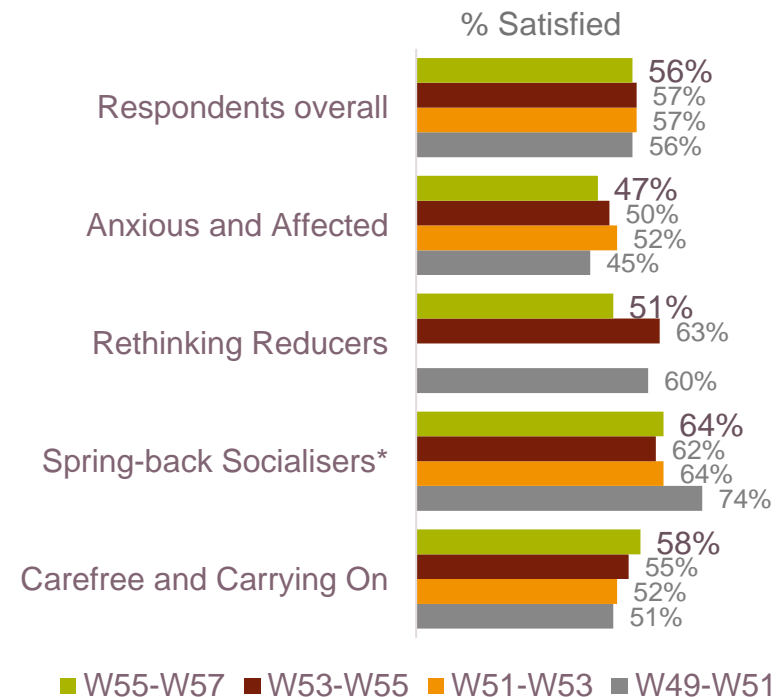
# Spring-back Socialisers are more likely than others to be satisfied with the how the staff helped them to feel safe during the journey

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 w55-w57 aggregated. Those who used a bus outside London between 9<sup>th</sup> July – 1<sup>st</sup> August 2021 (695).

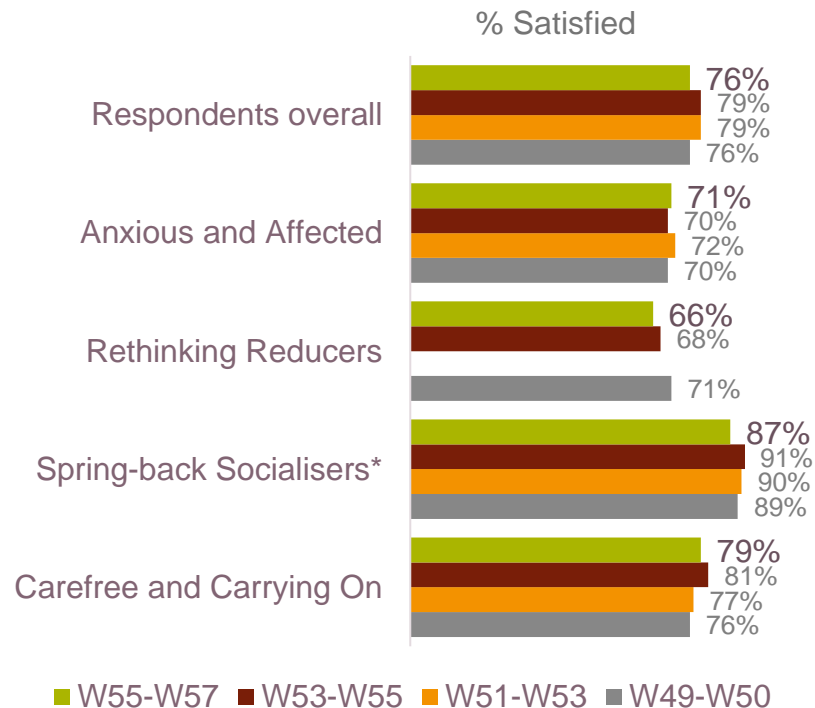
Anxious and Affected (202), Rethinking Reducers (63), Spring-back Socialisers (159), Carefree and Carrying On (235)

\* Denotes statistically significant difference from respondents overall.

**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



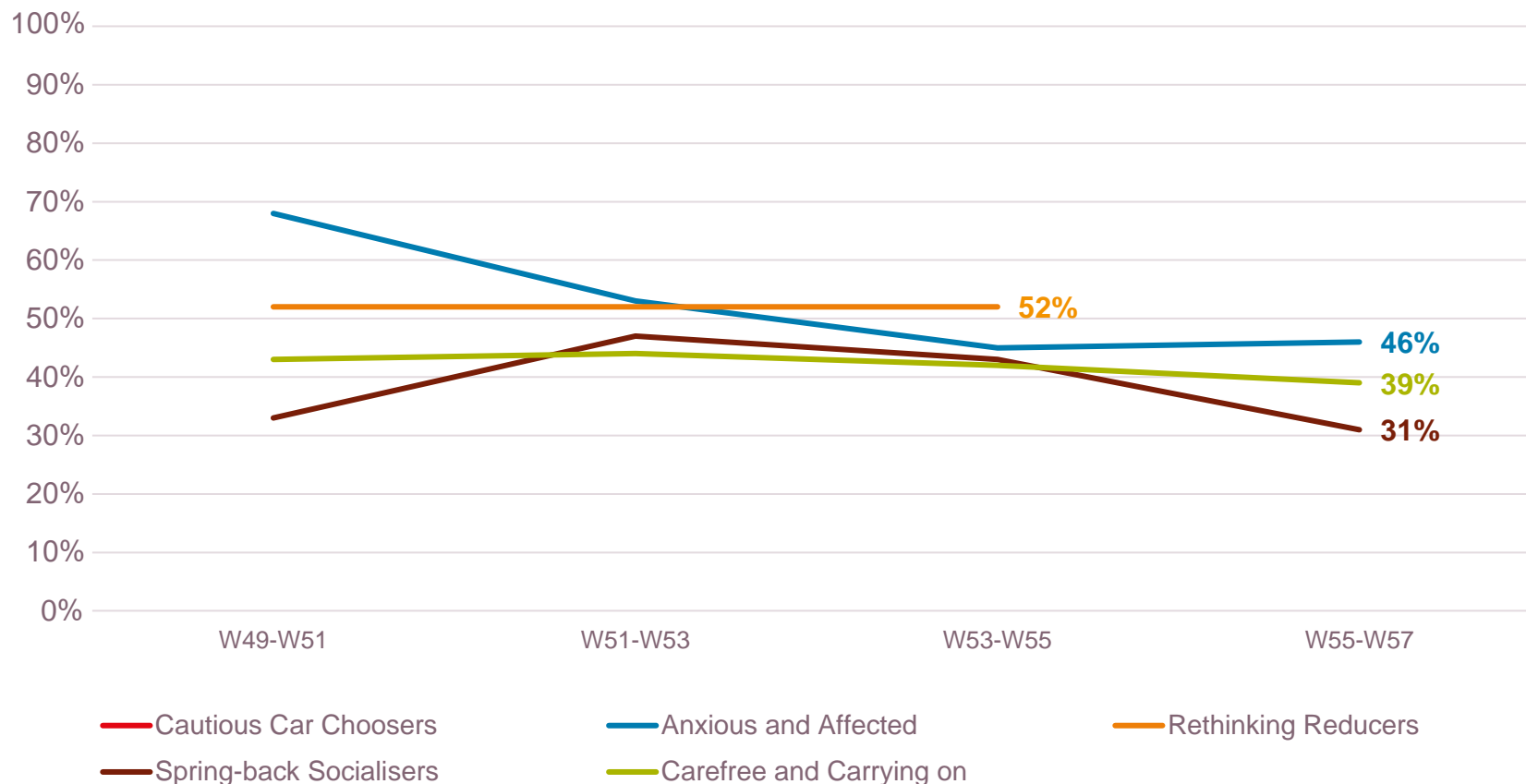
Base: Omnibus w55-w57 aggregated. Those who used a bus outside London between 9<sup>th</sup> July – 1<sup>st</sup> August 2021 (695).

Anxious and Affected (202), Rethinking Reducers (63), Spring-back Socialisers (159), Carefree and Carrying On (235)

\* Denotes statistically significant difference from respondents overall.

## 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

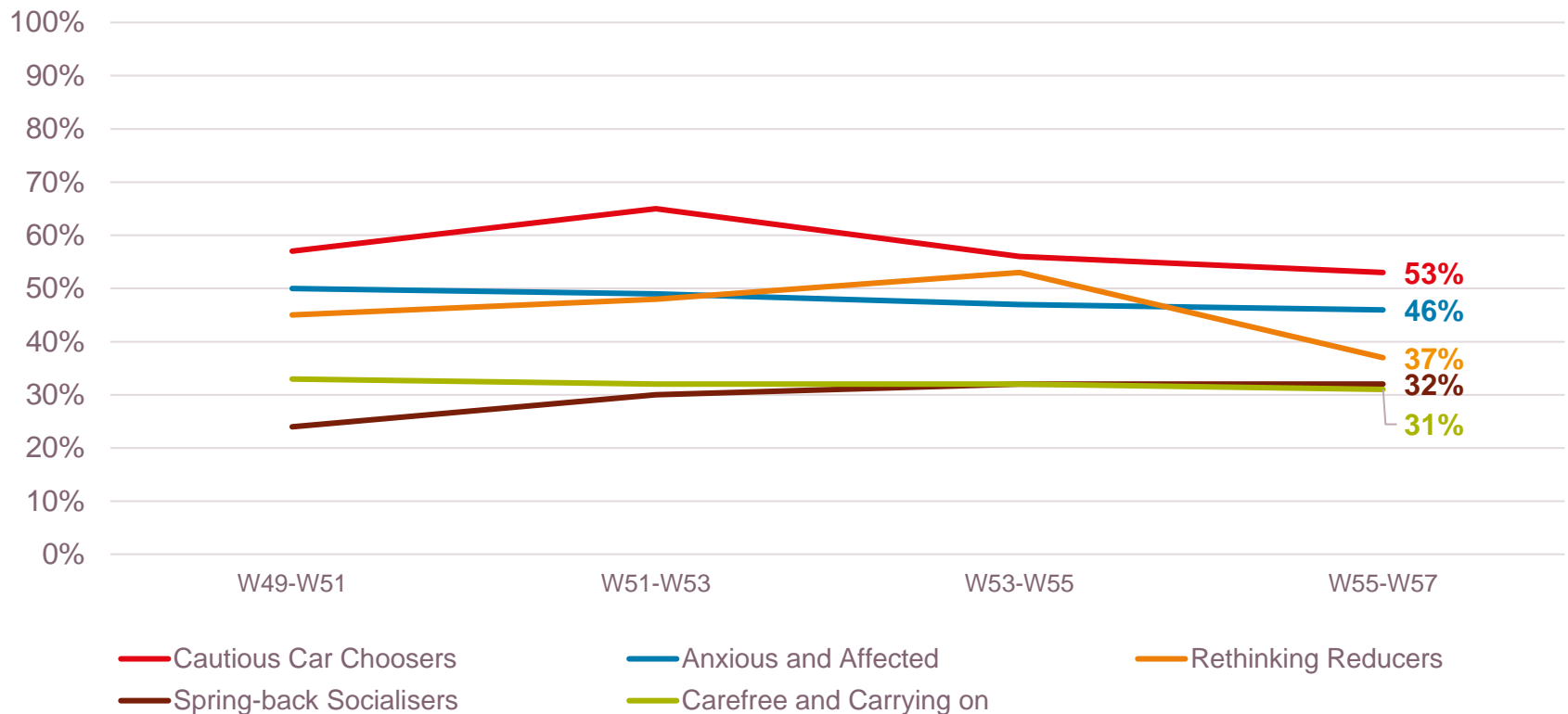
'On the last occasion that you used a train was it... % 'busier than expected')



Base: Those making a journey by train. Omnibus w55-w57 aggregated (540).  
Anxious and Affected (155), Spring-back Socialisers (91), Carefree and Carrying On (192)

## 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 used a bus was it... % ‘busier than expected’)



Base: Those making a journey by bus. Omnibus w55-w57 aggregated (1,059).

Cautious Car Choosers (65), Anxious and Affected (311), Rethinking Reducers (99) Spring-back Socialisers (215), Carefree and Carrying On (363)



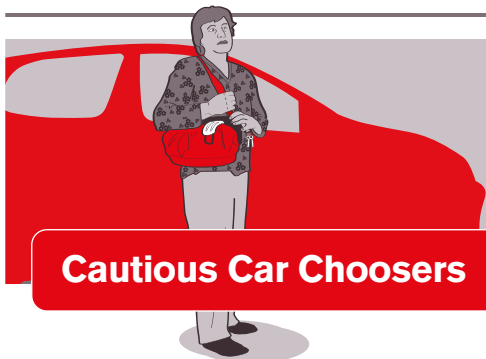
# Meet our segments



**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 56/57

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 56 / 57	4,054	897	754	361	710	1,232	100

## Contact Transport Focus

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[www.transportfocus.org.uk](http://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.**