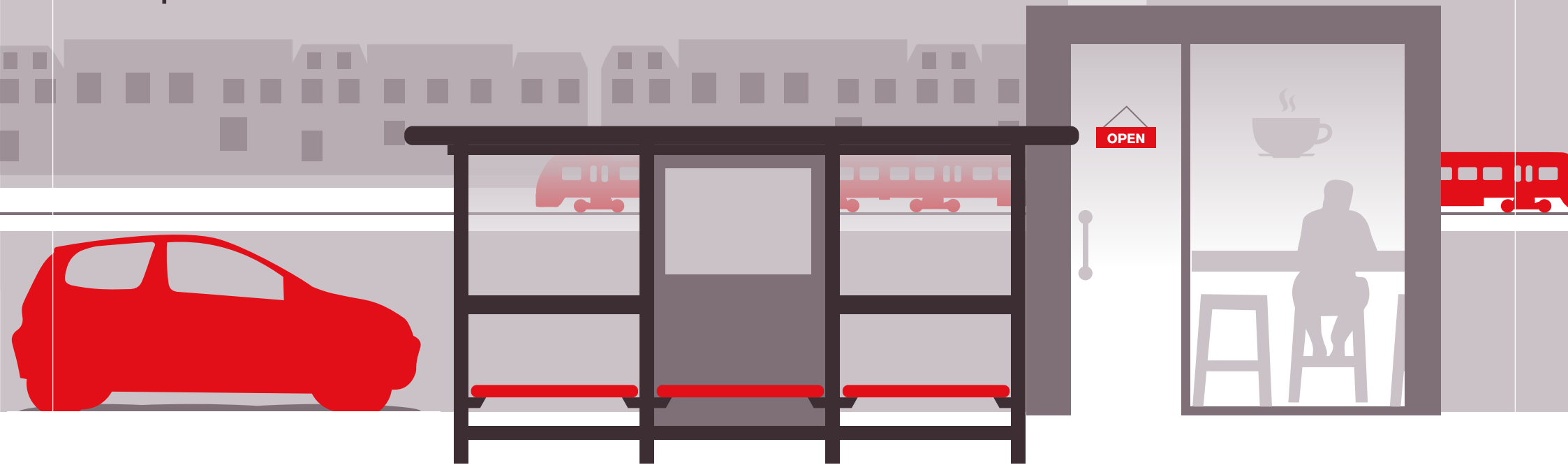


# Covid-19 travel segmentation

6 - 29 August analysis

September 2021



## When will more people feel comfortable returning to public transport?

This latest report shows how our five segments (see page 42) are feeling as summer holidays came to an end and more people contemplate a return to regular commuting.

We asked about how much people expect to travel to work or work from home over the next month. Across all the segments more travel for work is expected this month, but there are clear differences. Three in five of the Carefree and Carrying On segment expect to travel to work all the time. In contrast, and true to their name, just two in five Rethinking Reducers say the same, with one in four saying they will be working from home all the time.

We can see sustained decreases in people saying they won't use public transport unless social distancing is in place or face coverings are required. While Cautious Car Choosers attitudes are unmoved, it is encouraging to see fewer Anxious and Affected, Rethinking Reducers and Spring-back Socialisers viewing these interventions as necessary for them to use public transport. However, relaxation in attitudes could be a double-edged sword. At the same time, passengers' satisfaction with number of people wearing face coverings on train and bus is decreasing across almost all the segments. Less than half the Anxious and Affected are now satisfied.

Continues on page 3....

# When will more people feel comfortable returning to public transport?

In this report we've explored the gap between the measures people would like to see in place on public transport and the measures they think are actually in place. While it shows the Carefree and Carrying On generally feel the measures they need are in place, other segments show some significant gaps operators should keep trying to plug. Almost two in three of the Anxious and Affected want enhanced cleaning and regular cleaning throughout the day, but only around one in three believe this is happening. More than half of this segment want hand sanitiser to be provided, but only one in five think this is provided. Closing these gaps could help these more nervous people feel more confident to travel.

So, how soon do people feel they will be as comfortable as before? The pattern is as you might by now expect. Only two in five of the Anxious and Affected say they will feel as comfortable using a train or a bus within the next six months as they did before the pandemic. In contrast more than seven in ten of those who are Carefree and Carrying On say the same.

This report highlights again the gulf between the different segments and that, while attitudes to public transport are slowly improving, for some it will still take a long time. To continue this slow process of rebuilding confidence operators must not let up additional measures to help people feel safe and should keep raising awareness of their efforts.

# 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

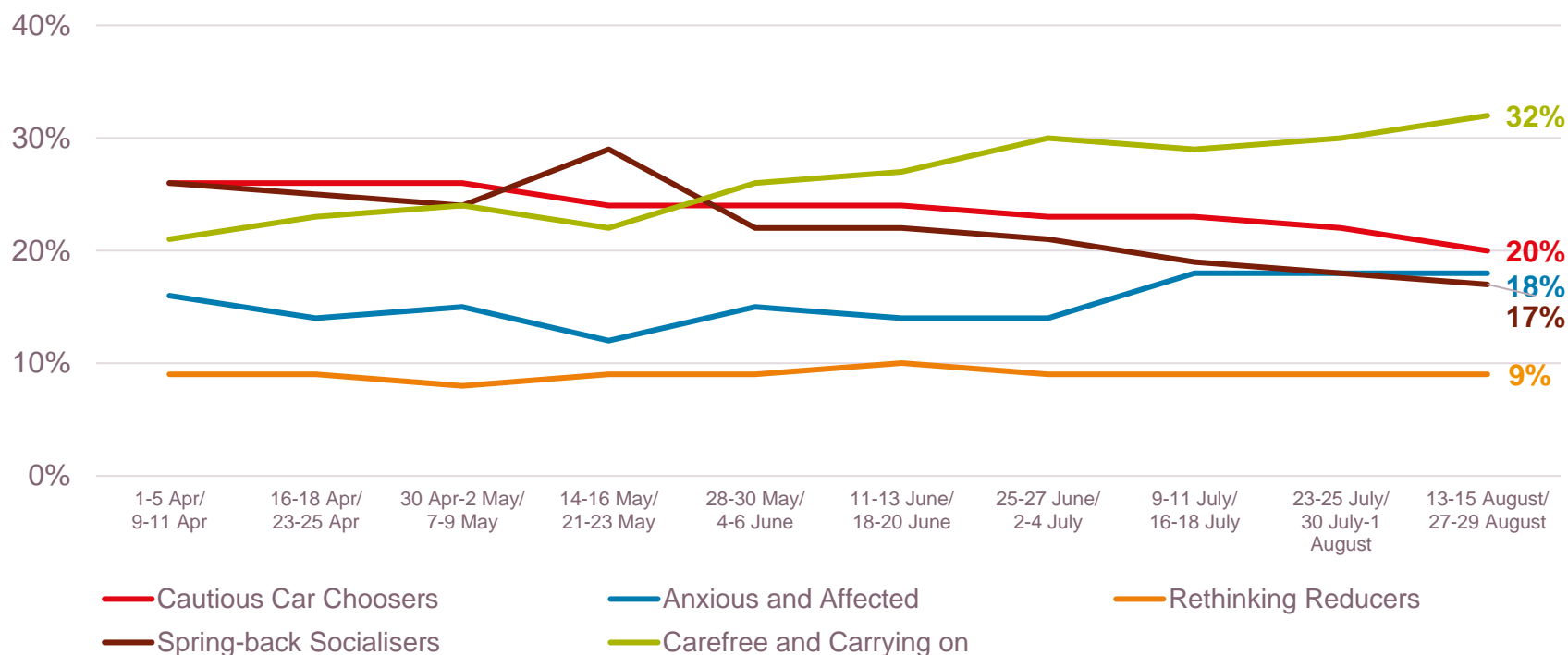
Fieldwork dates	Omnibus Waves
13-15 August / 27-29 August	W58 + W59

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.

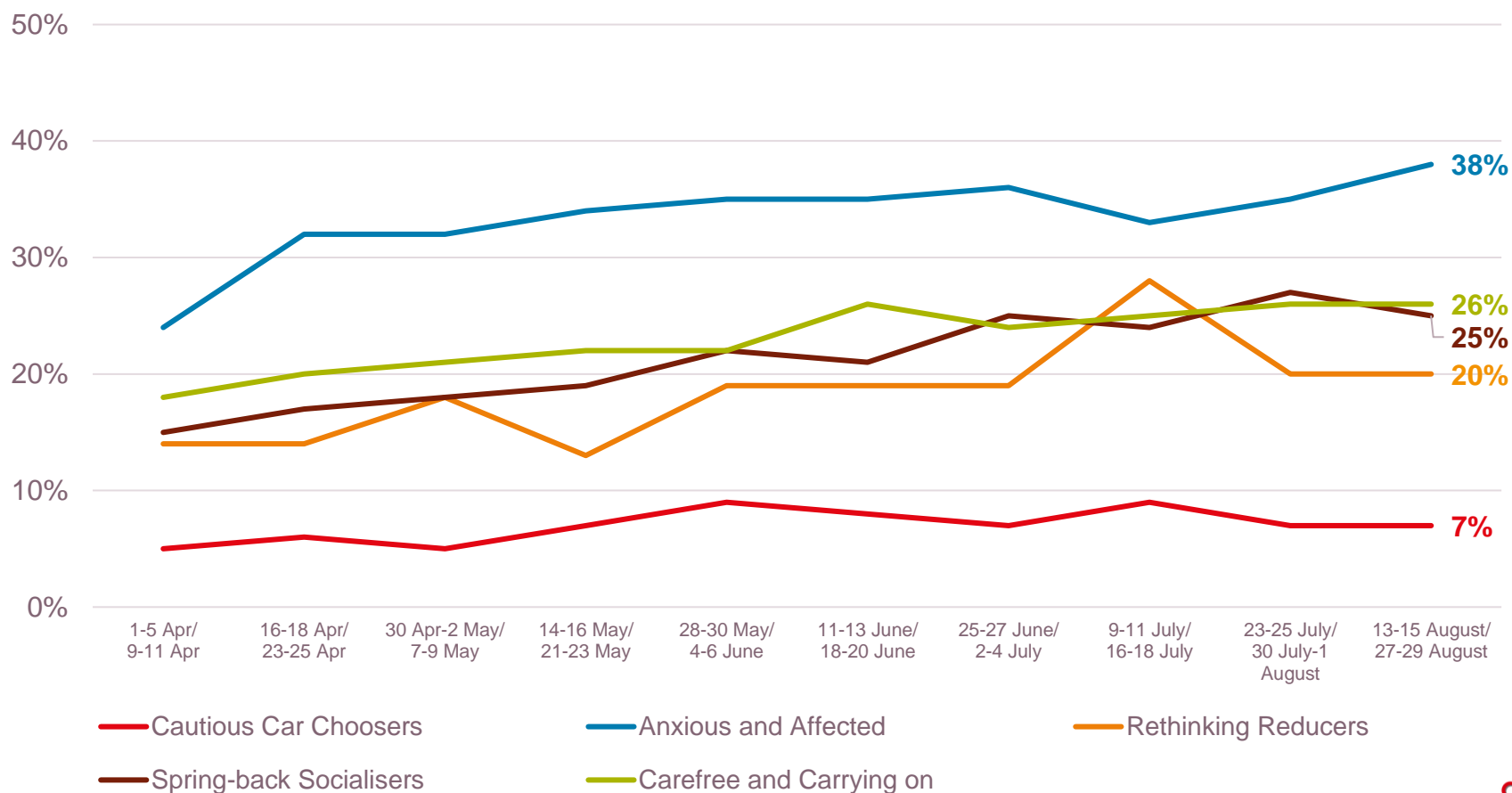
## Segment size\*



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

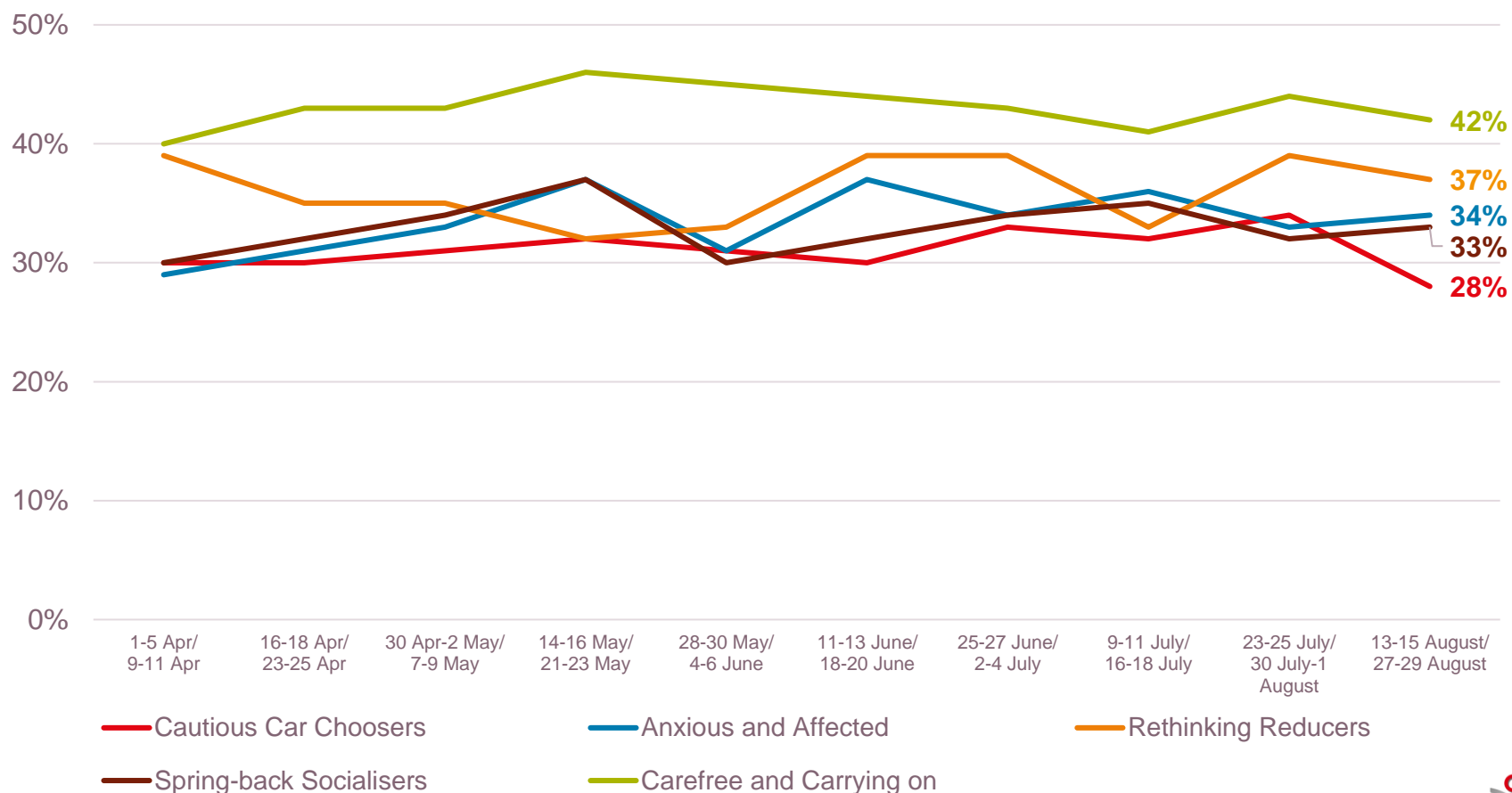
**The Anxious and Affected segment are more likely than others to have used public transport in the last seven days. Increasing proportions of those who are Carefree and Carrying On and Spring-back Socialisers are doing the same.**

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



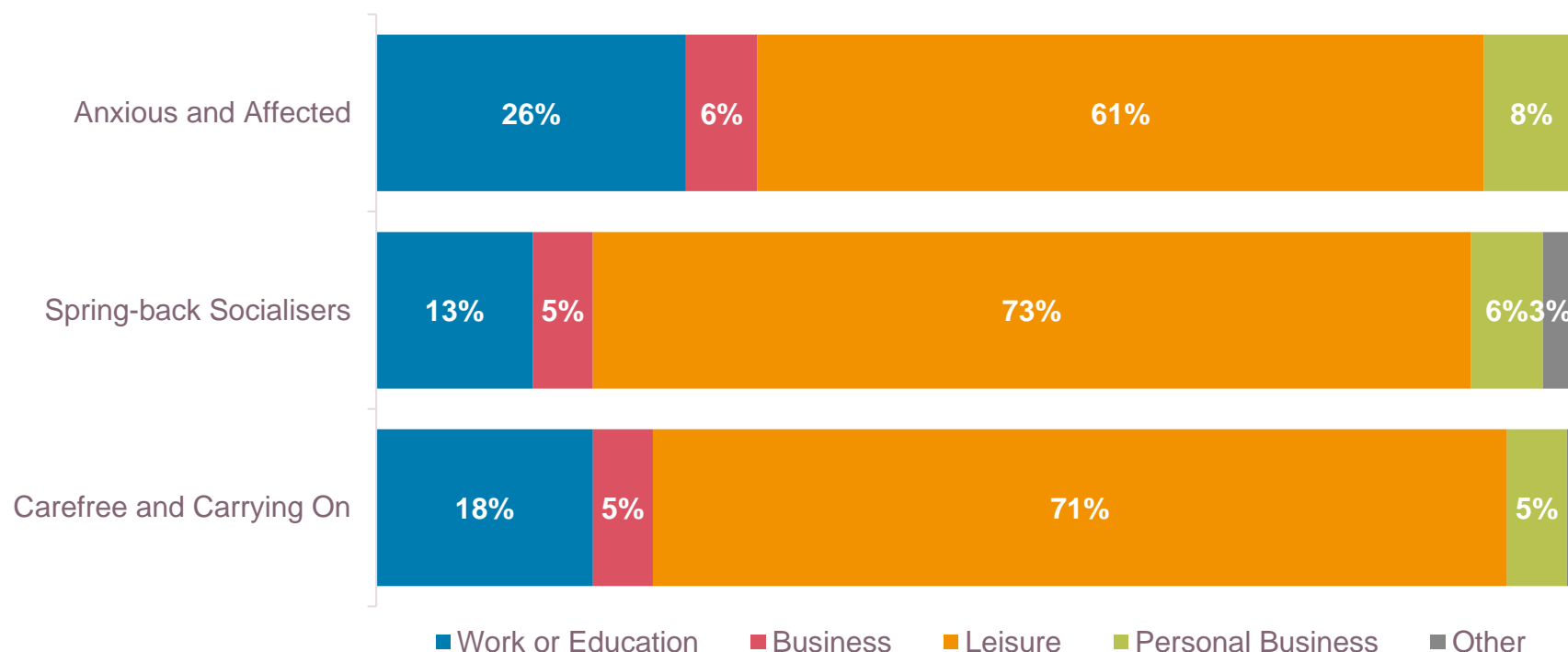
## The Carefree and Carrying on segment continue to be more likely than others to be making journeys to or from work in the last seven days

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?



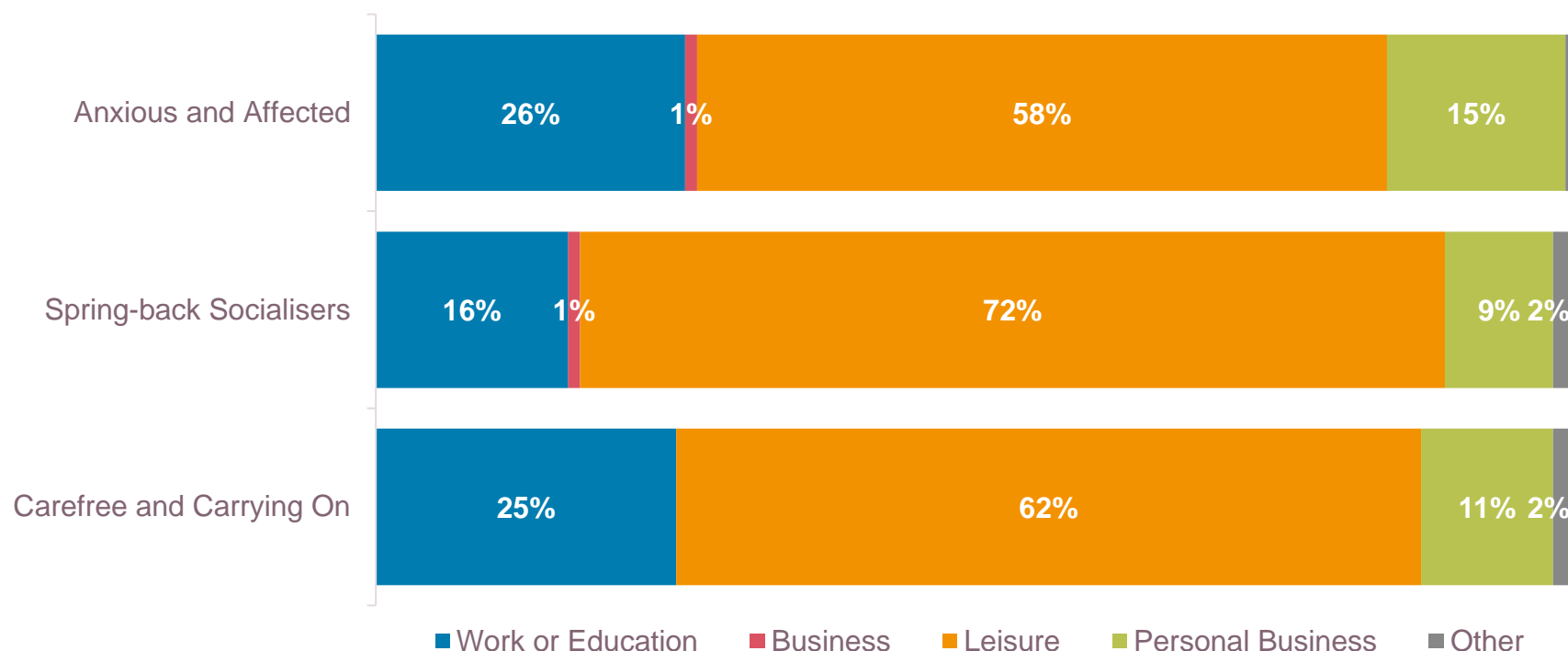
Base: Those making a journey by train. Omnibus w58-w59 aggregated. Anxious and Affected (102), Spring-back Socialisers (65), Carefree and Carrying On (139).

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



## Those who are Anxious and Affected, and those who are Carefree and Carrying On 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?

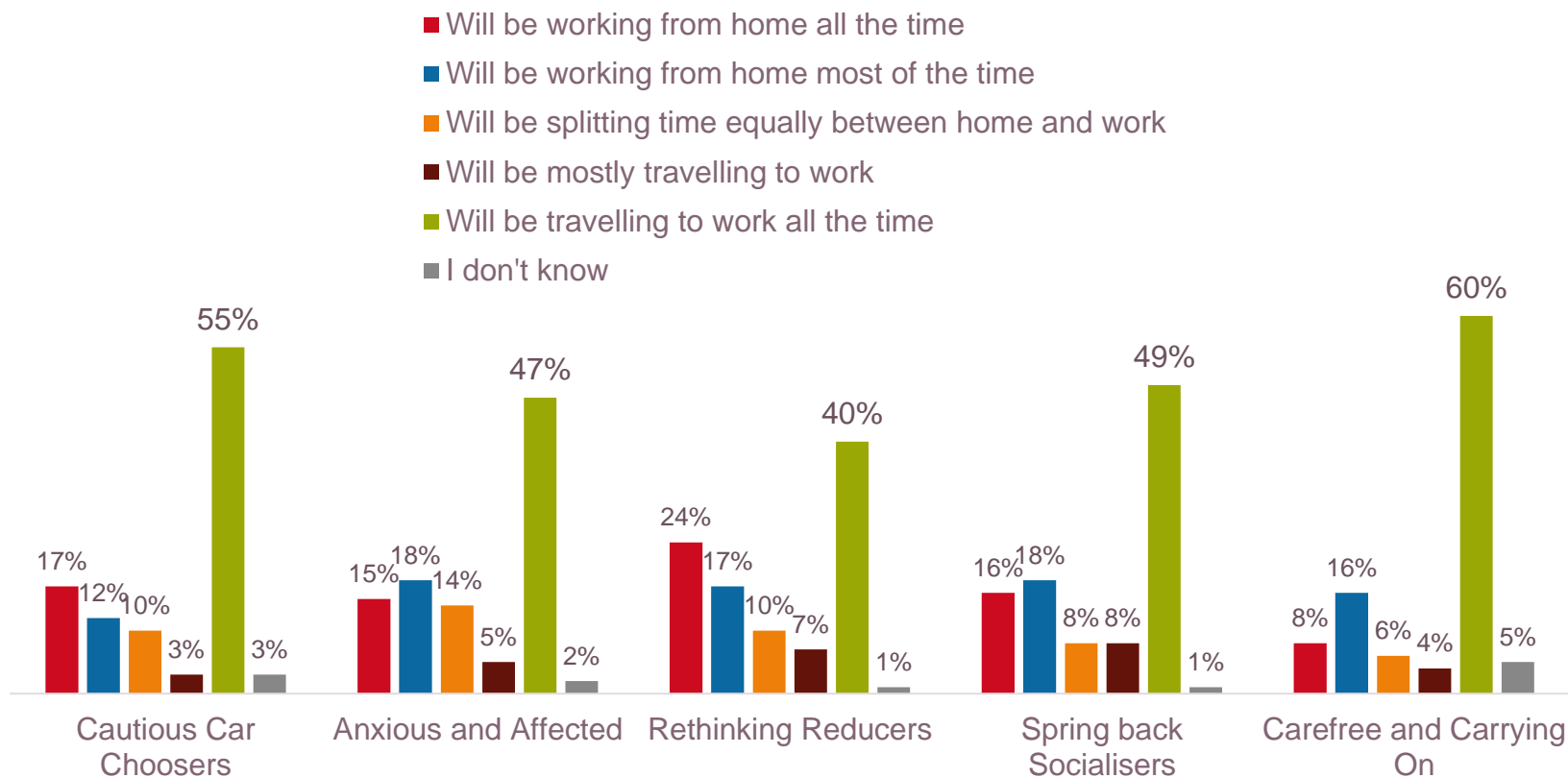


Base: Those making a journey by bus outside London. Omnibus w58-w59 aggregated. Anxious and Affected (132), Spring-back Socialisers (96), Carefree and Carrying On (160).

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

**Those who are Carefree and Carrying On are more likely than other segments to expect to be travelling to work all the time next month. Rethinking Reducers are more likely to be working from home all the time.**

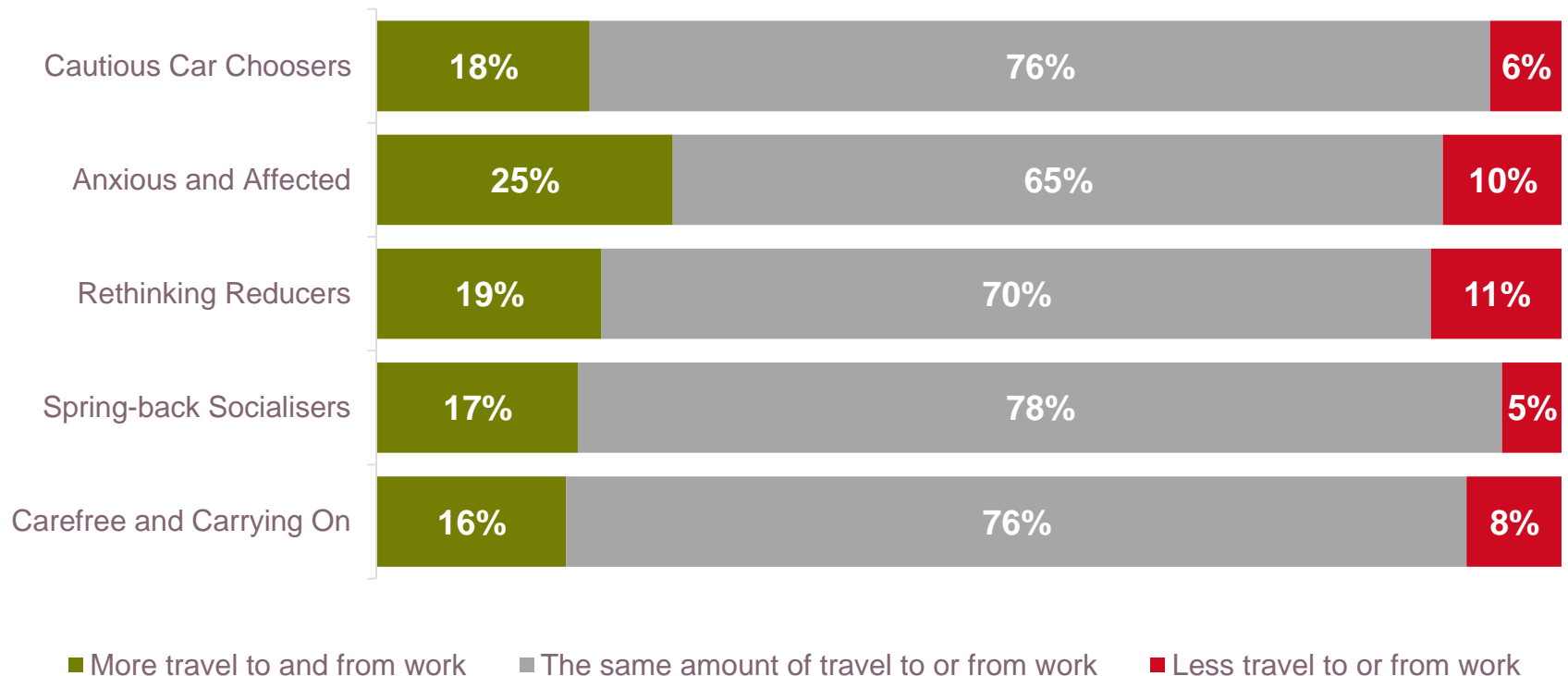
Which of the following statements best applies to you? In the next month it is most likely that I...



Base: Those who are working full or part time. Omnibus w59 only. Cautious Car Choosers (198), Anxious and Affected (214), Rethinking Reducers (118), Spring-back Socialisers (157), Carefree and Carrying On (414).

## A quarter of those who are Anxious and Affected expect to travel to and from work more often next month than they have previously.

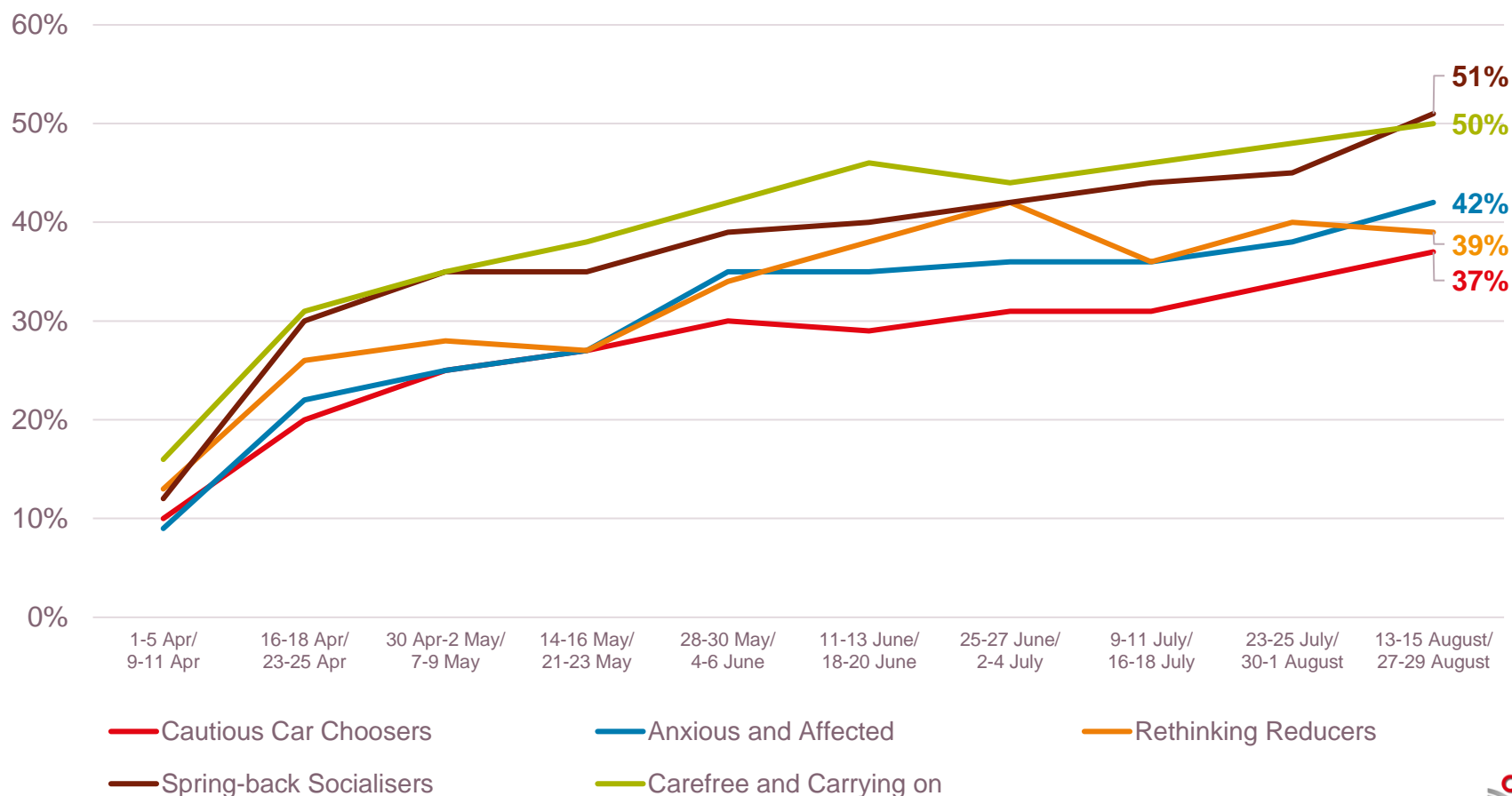
Leaving aside any time off for holidays, how does this compare with you work travel over the last month?



Base: Those who are working full or part time and have an idea of their future work patterns. Omnibus w59 only.  
Cautious Car Choosers (191), Anxious and Affected (211), Rethinking Reducers (117), Spring-back Socialisers (155),  
Carefree and Carrying On (395).

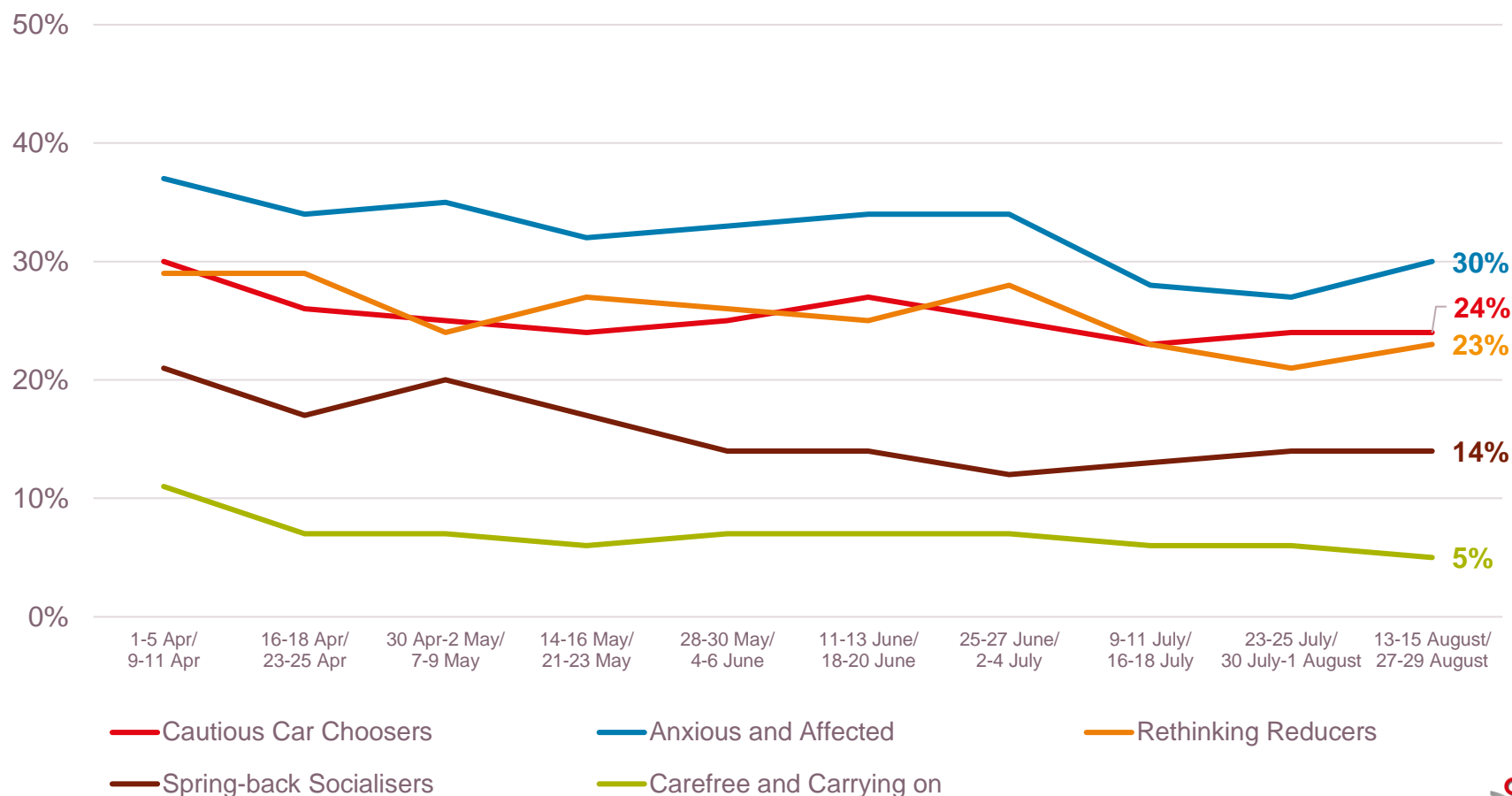
## The Carefree and Carrying on segment and the Spring-back Socialisers are more likely than others to be making journeys for leisure reasons

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



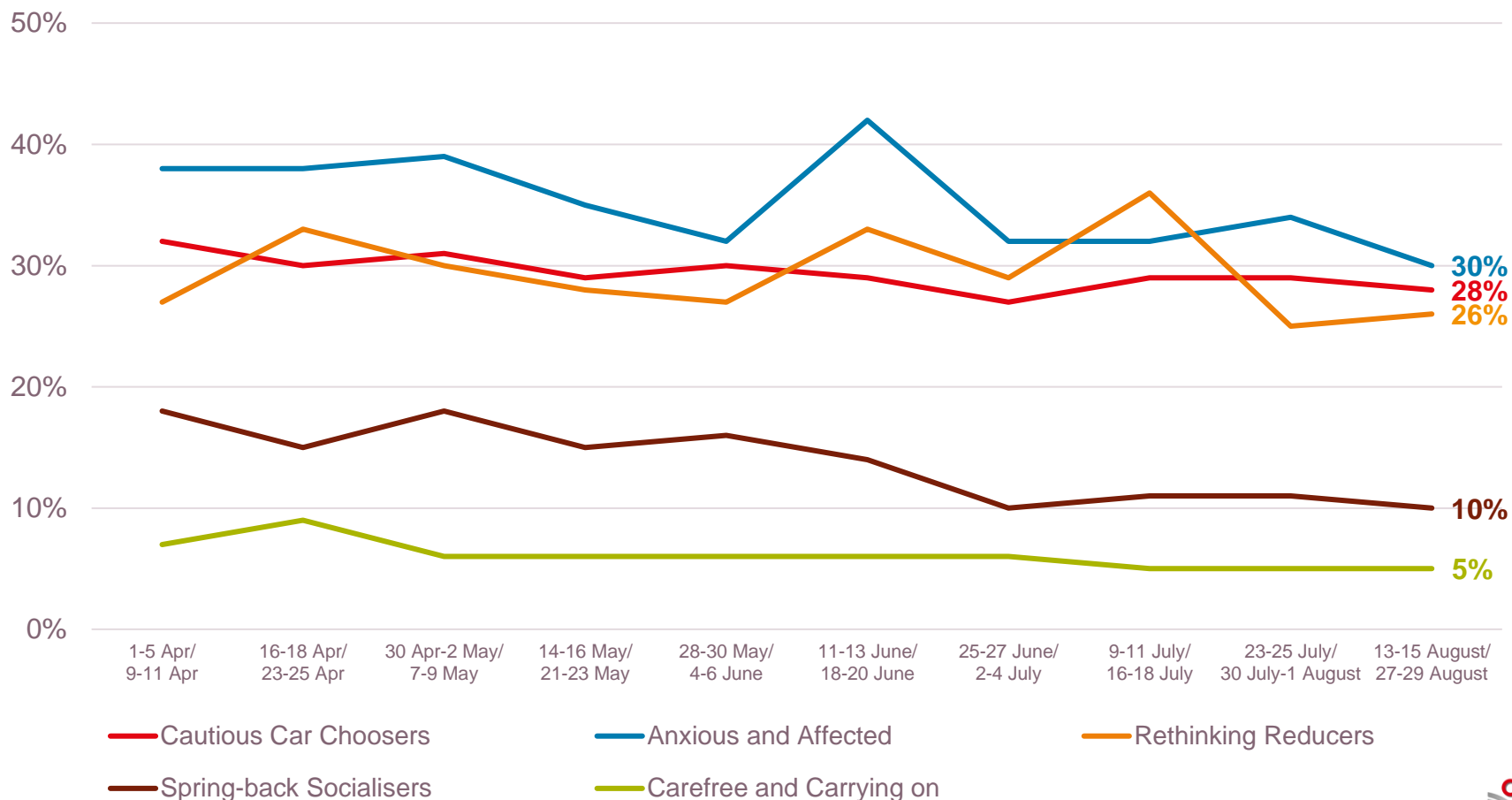
## The proportion of those who are avoiding using public transport has increased among Rethinking Reducers and those who are Anxious and Affected

Proportions avoiding using public transport



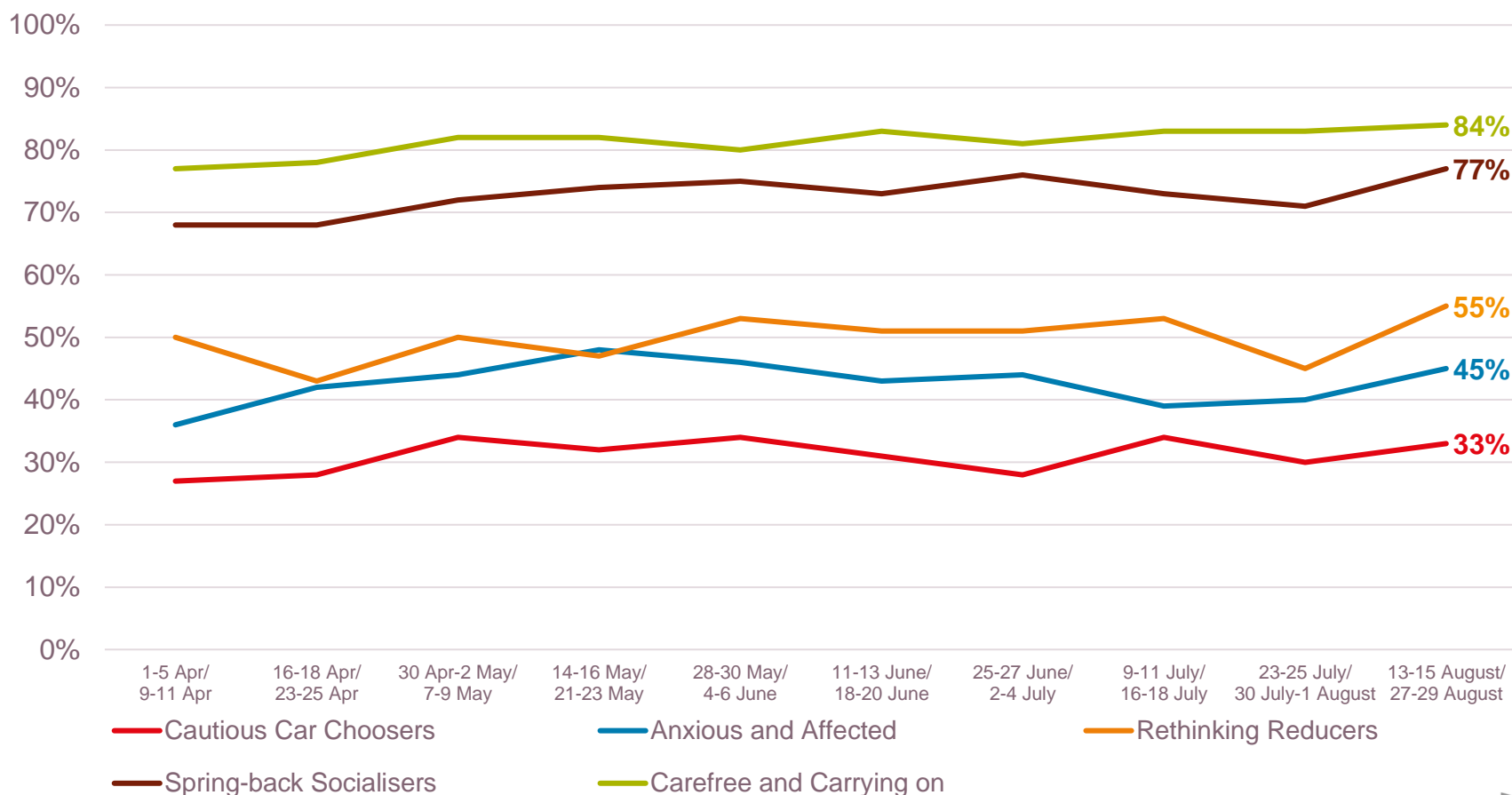
**Across many of the segments the proportion of those who are not using public transport because they think it is not safe to do so is falling marginally.**

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



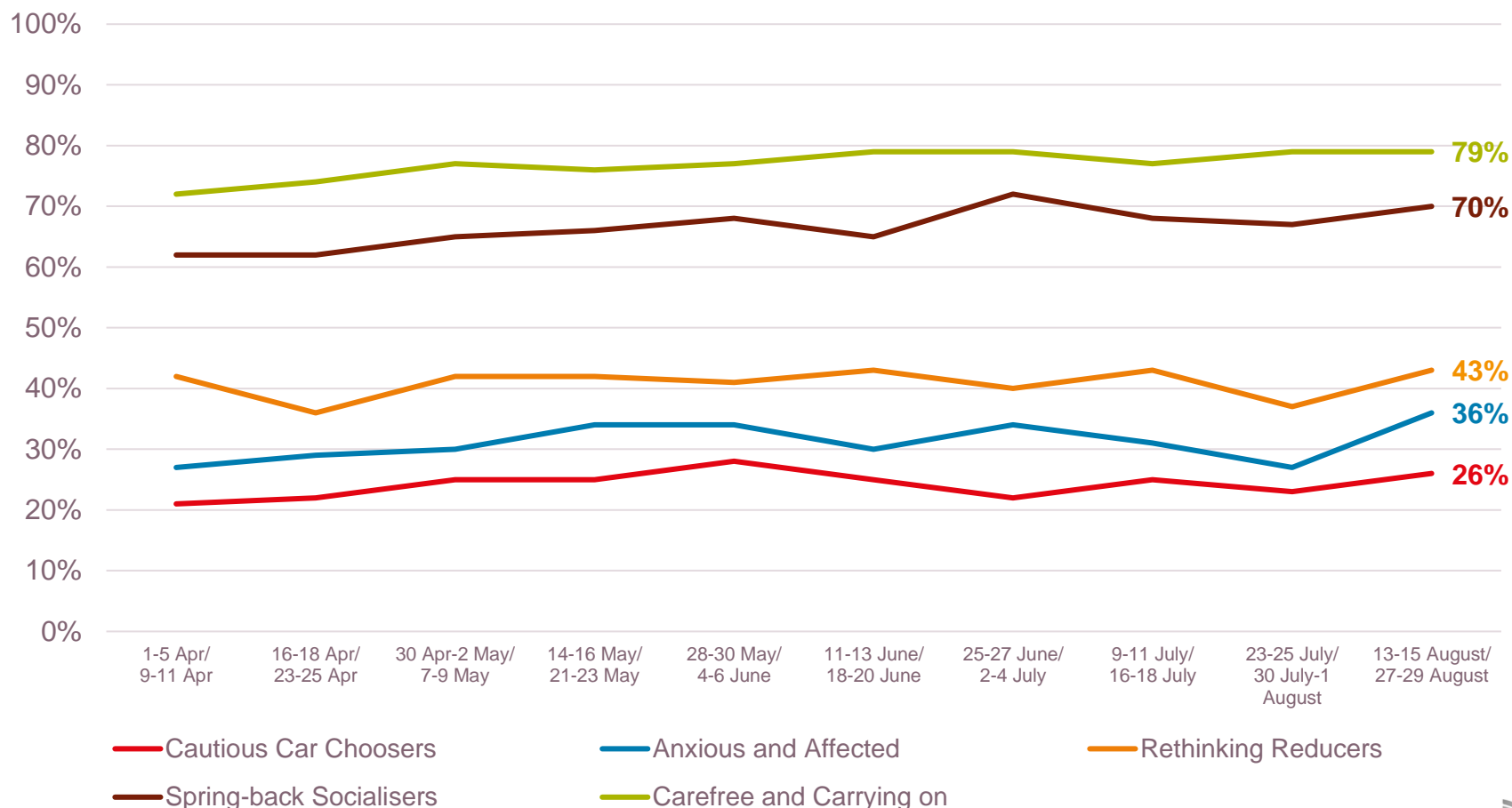
**Among those who have not used a train in the last seven days, those who are Carefree and Carrying on, and those who are Spring-back Socialisers are more likely than others to say that they would feel safe to do so**

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

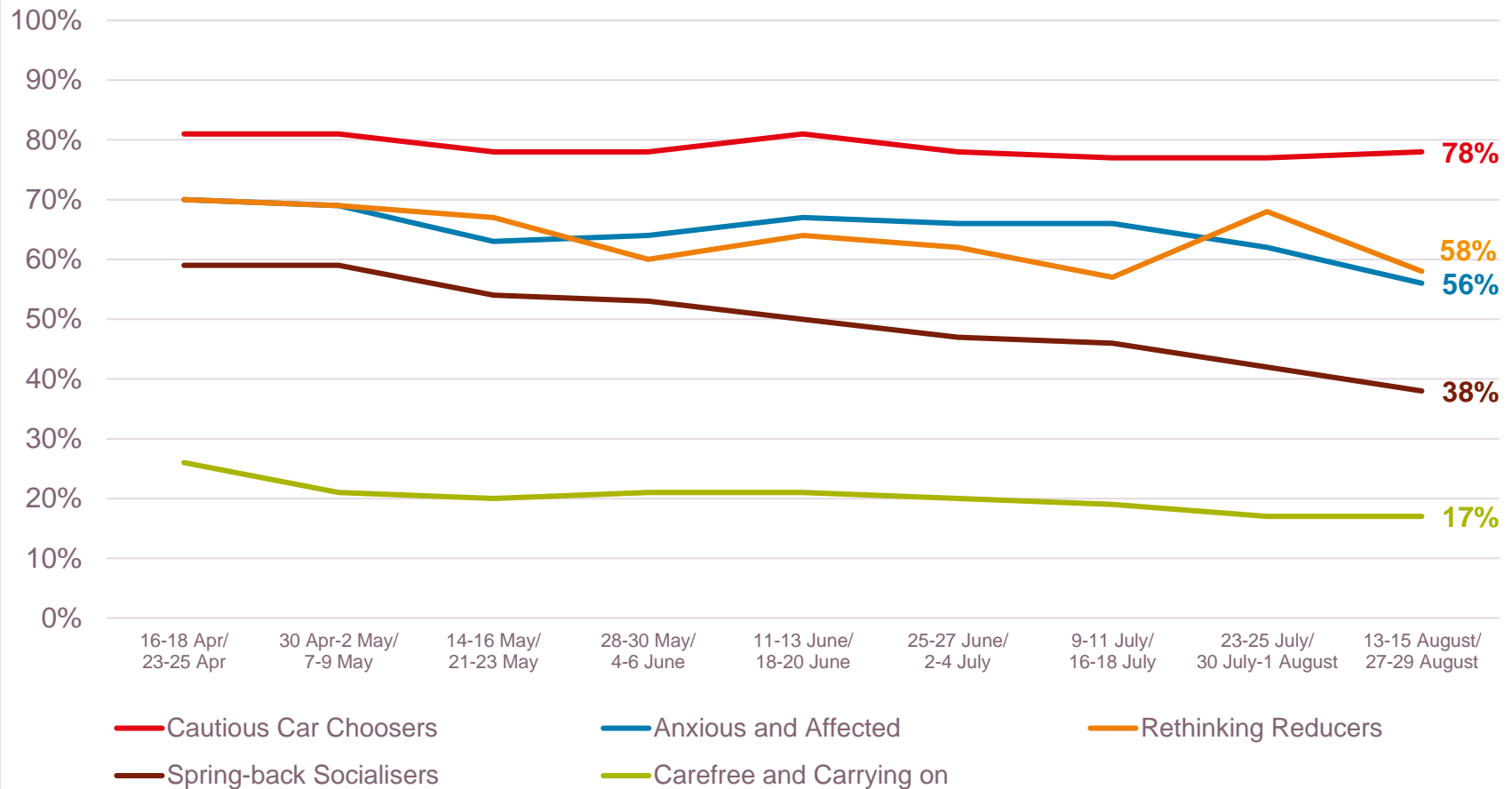
How safe would you feel making a journey by bus? (% 'safe')





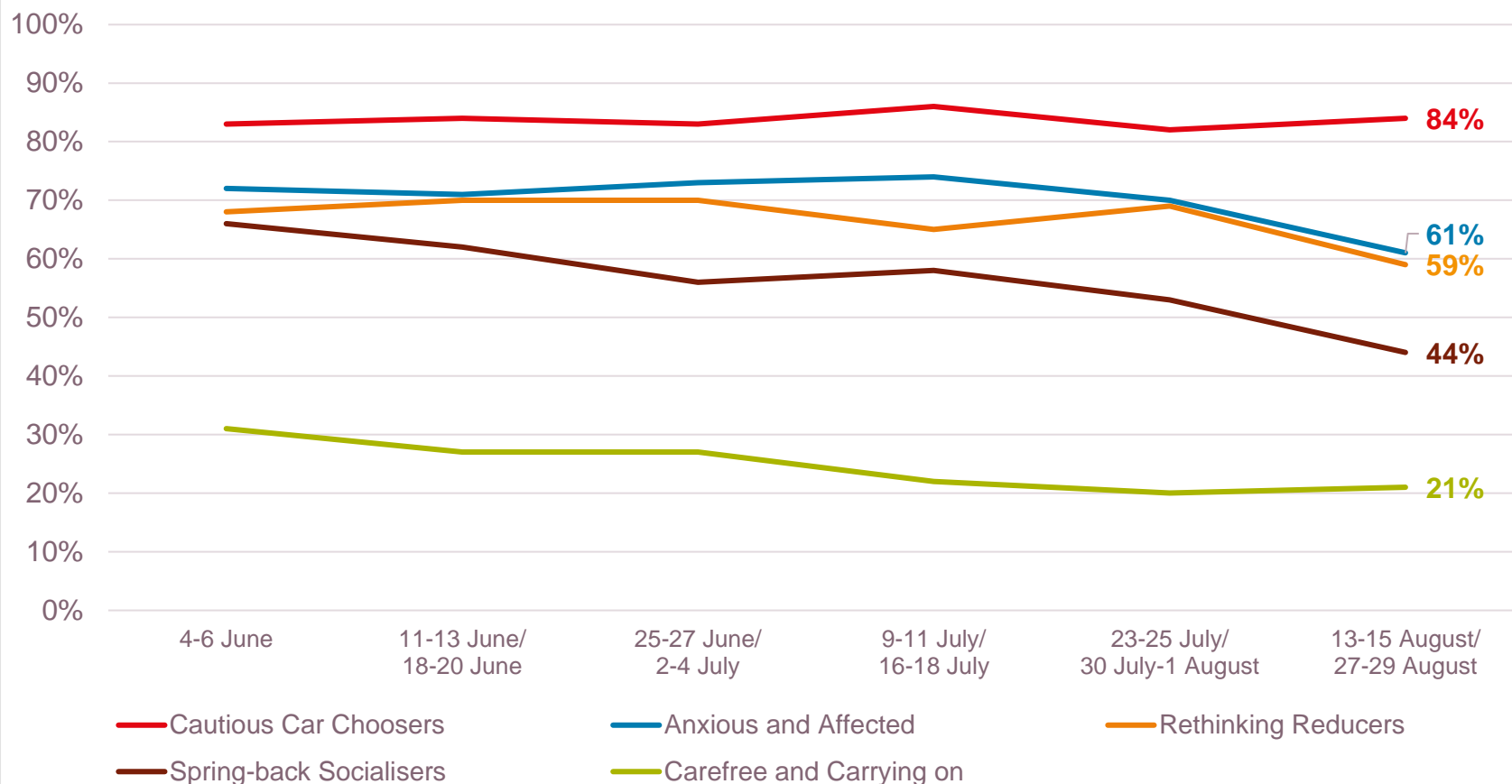
**Apart from Cautious Car Choosers and those who are Carefree and Carrying on, among other segments there has been a decrease in the proportion who say that they won't use public transport unless social distancing is in place**

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



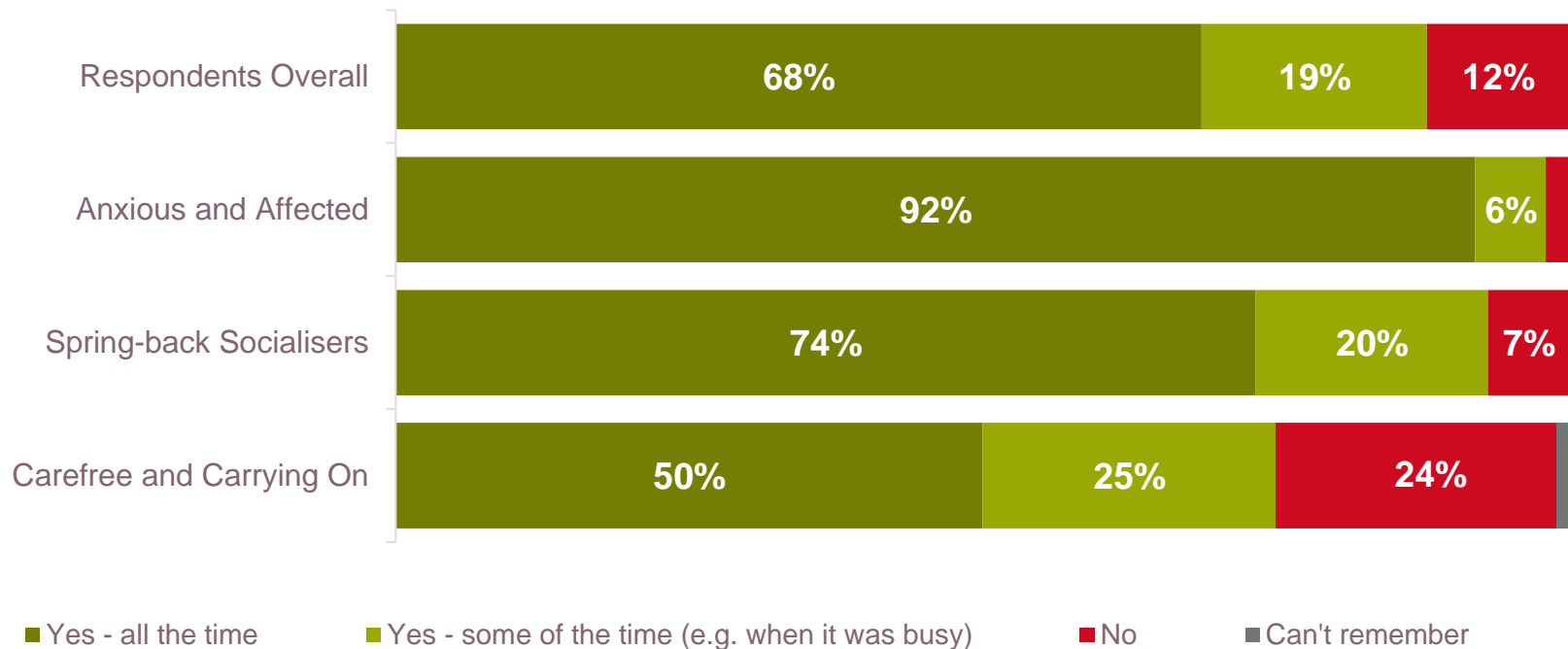
**Apart from Cautious Car Choosers and those who are Carefree and Carrying on, among other segments there has been a decrease in the proportion who say that they won't use public transport unless passengers are required to wear face coverings**

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

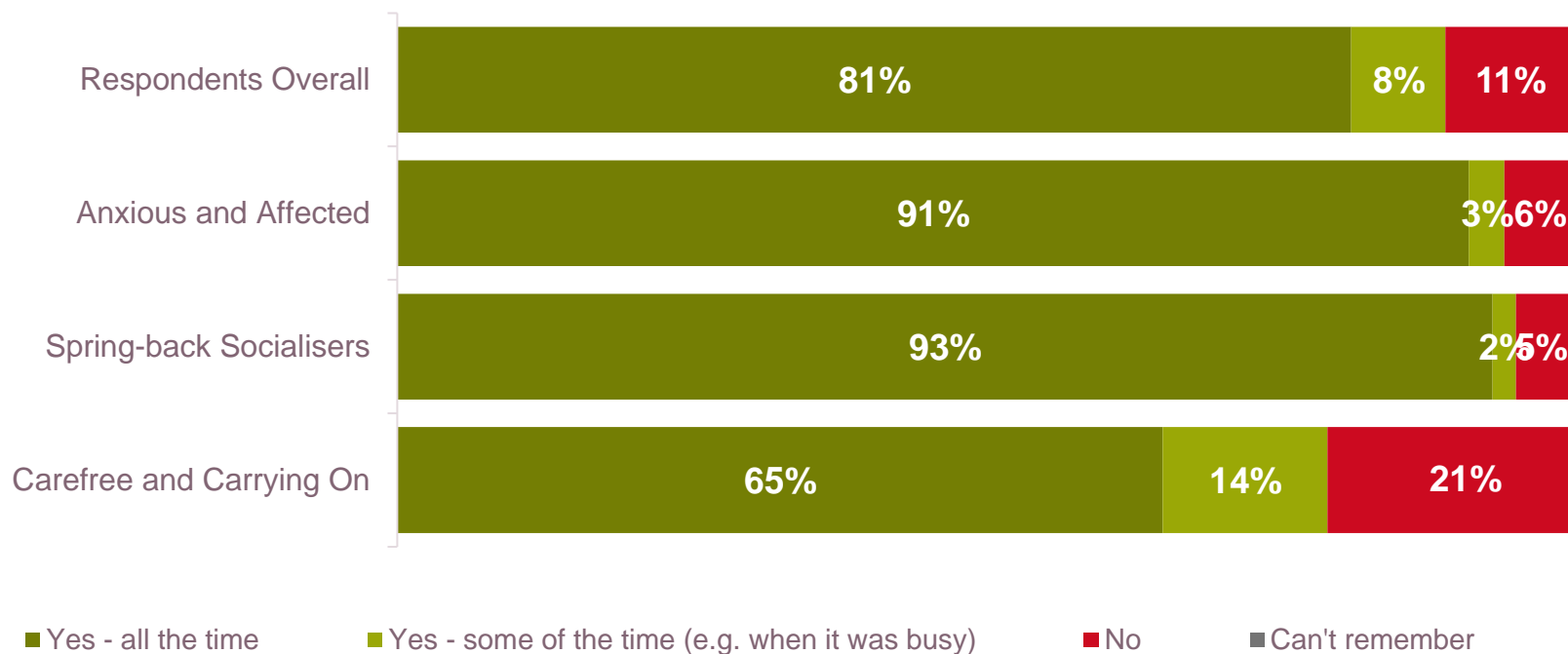


Base: Those making a journey by train. Omnibus w58-w59 aggregated (369). Anxious and Affected (103), Spring-back Socialisers (65), Carefree and Carrying On (139).

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?



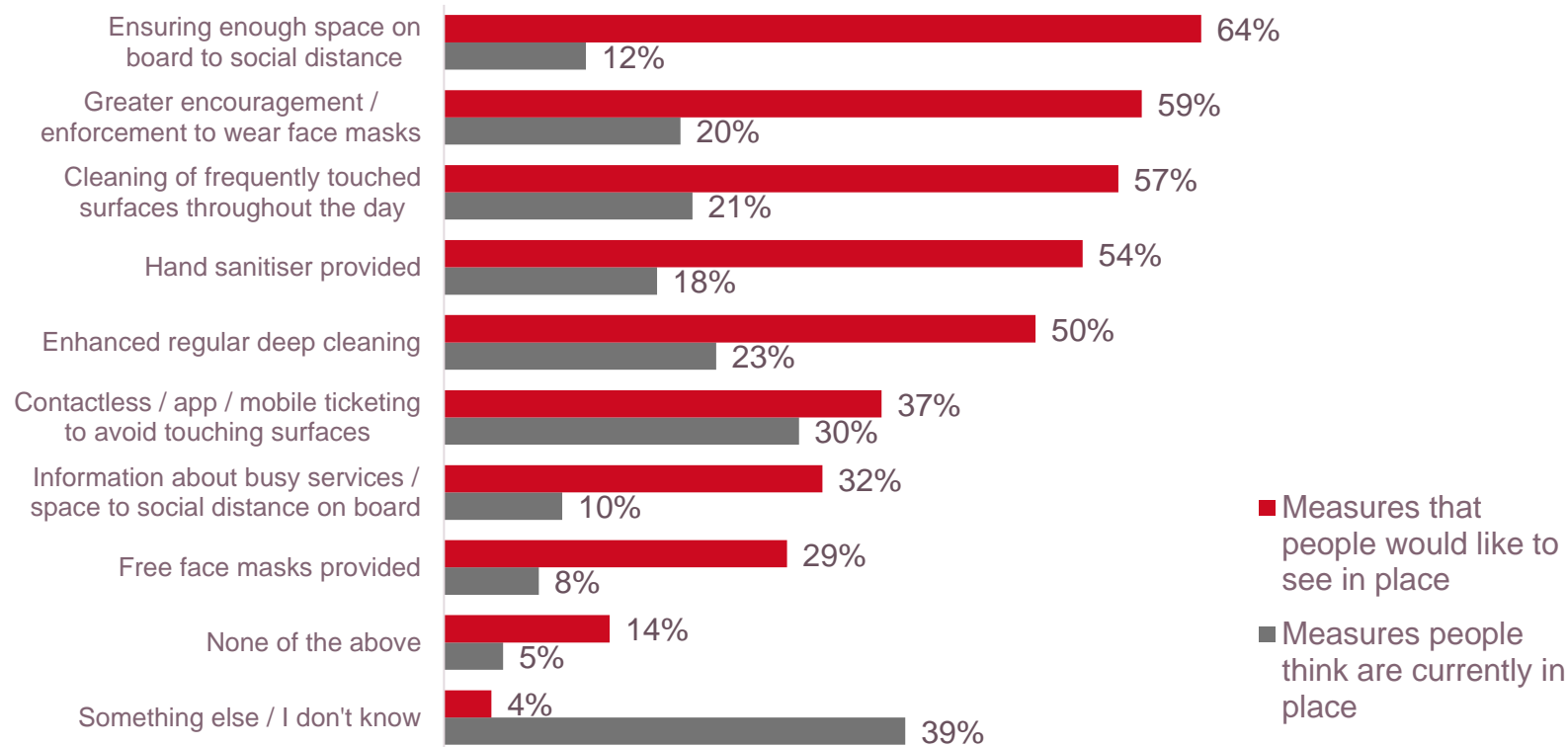
Base: Those making a journey by bus outside London. Omnibus w58-w59 aggregated (641). Anxious and Affected (210), Spring-back Socialisers (124), Carefree and Carrying On (229).

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

## Two thirds of Cautious Car Choosers would like to see enough space to social distance ensured on public transport to make them feel more comfortable, though only 12 per cent think this measure is currently in place

Which of the following measures do you need to see in place to feel more comfortable travelling on public transport?

And which of the following measures do you think are currently in place on public transport?

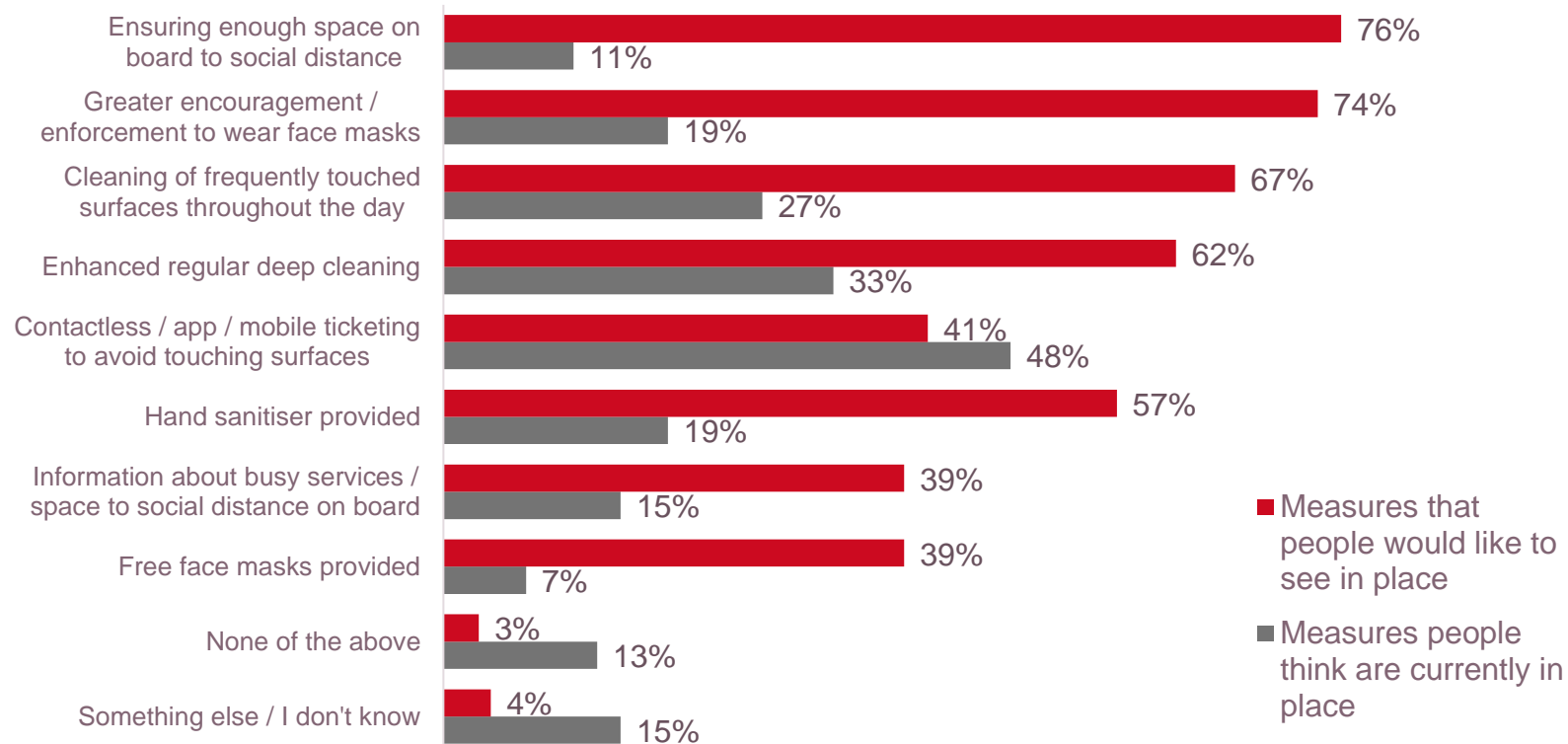


Base: W59 only. Cautious Car Choosers (437)

**Three quarters of those who are Anxious and Affected would like to see enough space to social distance ensured on public transport to make them feel more comfortable, though only 11 per cent think this measure is currently in place**

**Which of the following measures do you need to see in place to feel more comfortable travelling on public transport?**

**And which of the following measures do you think are currently in place on public transport?**

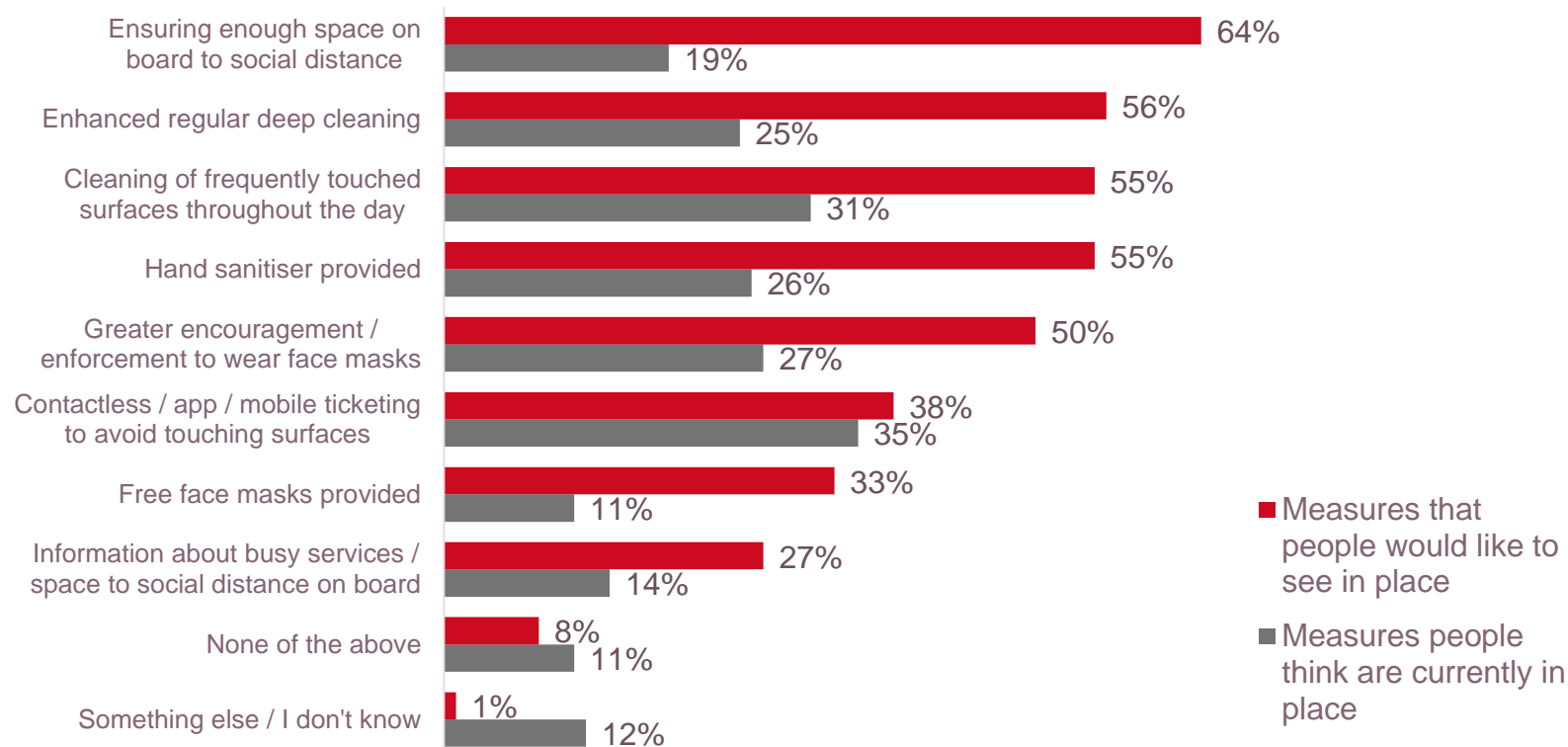


Base: W59 only. Anxious and Affected (369)

## Two thirds of Rethinking Reducers would like to see enough space to social distance ensured on public transport to make them feel more comfortable, though only 19 per cent think this measure is currently in place

Which of the following measures do you need to see in place to feel more comfortable travelling on public transport?

And which of the following measures do you think are currently in place on public transport?

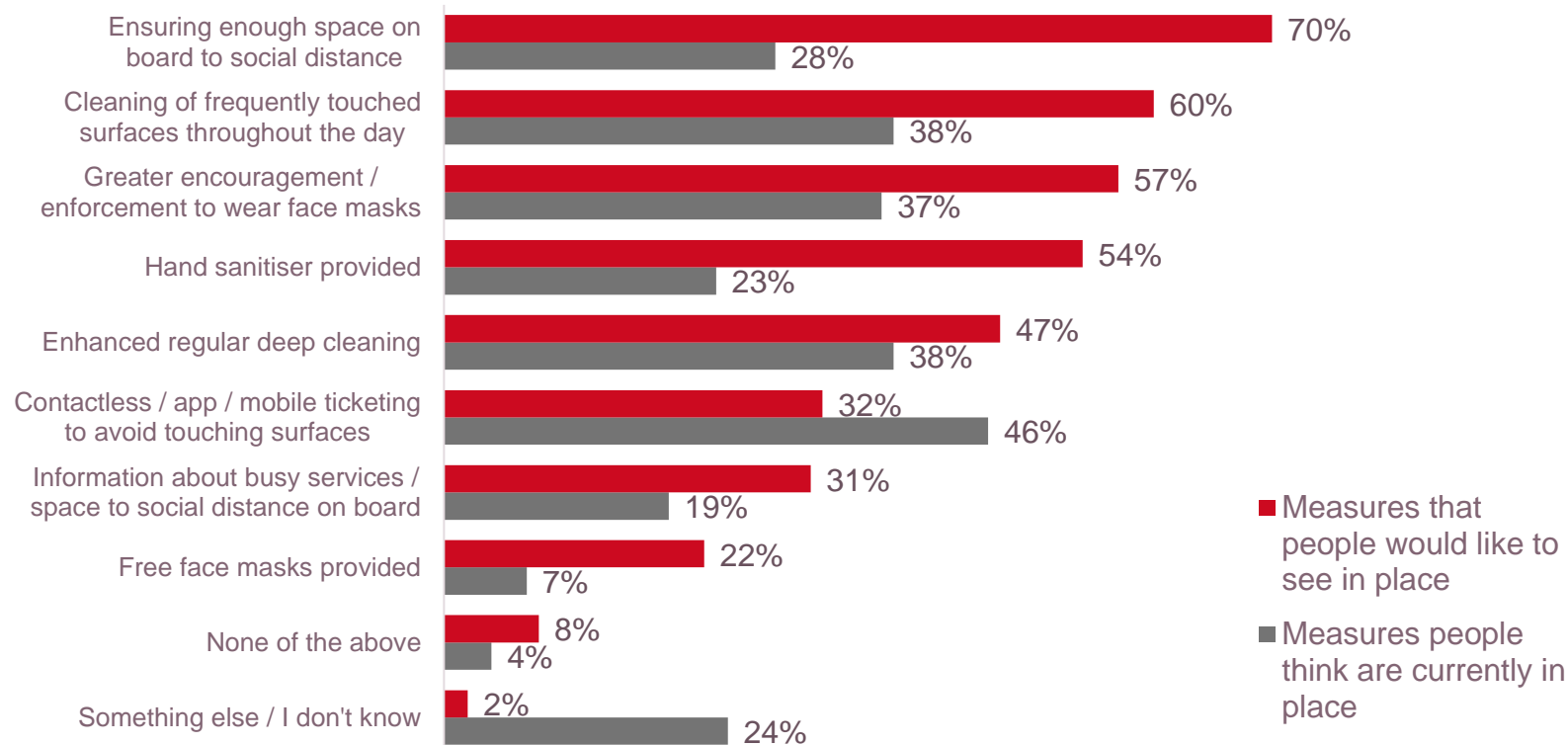


Base: W59 only. Rethinking Reducers (189)

## Seven in ten Spring-back Socialisers would like to see enough space to social distance ensured on public transport to make them feel more comfortable, though 28 per cent think this measure is currently in place

Which of the following measures do you need to see in place to feel more comfortable travelling on public transport?

And which of the following measures do you think are currently in place on public transport?



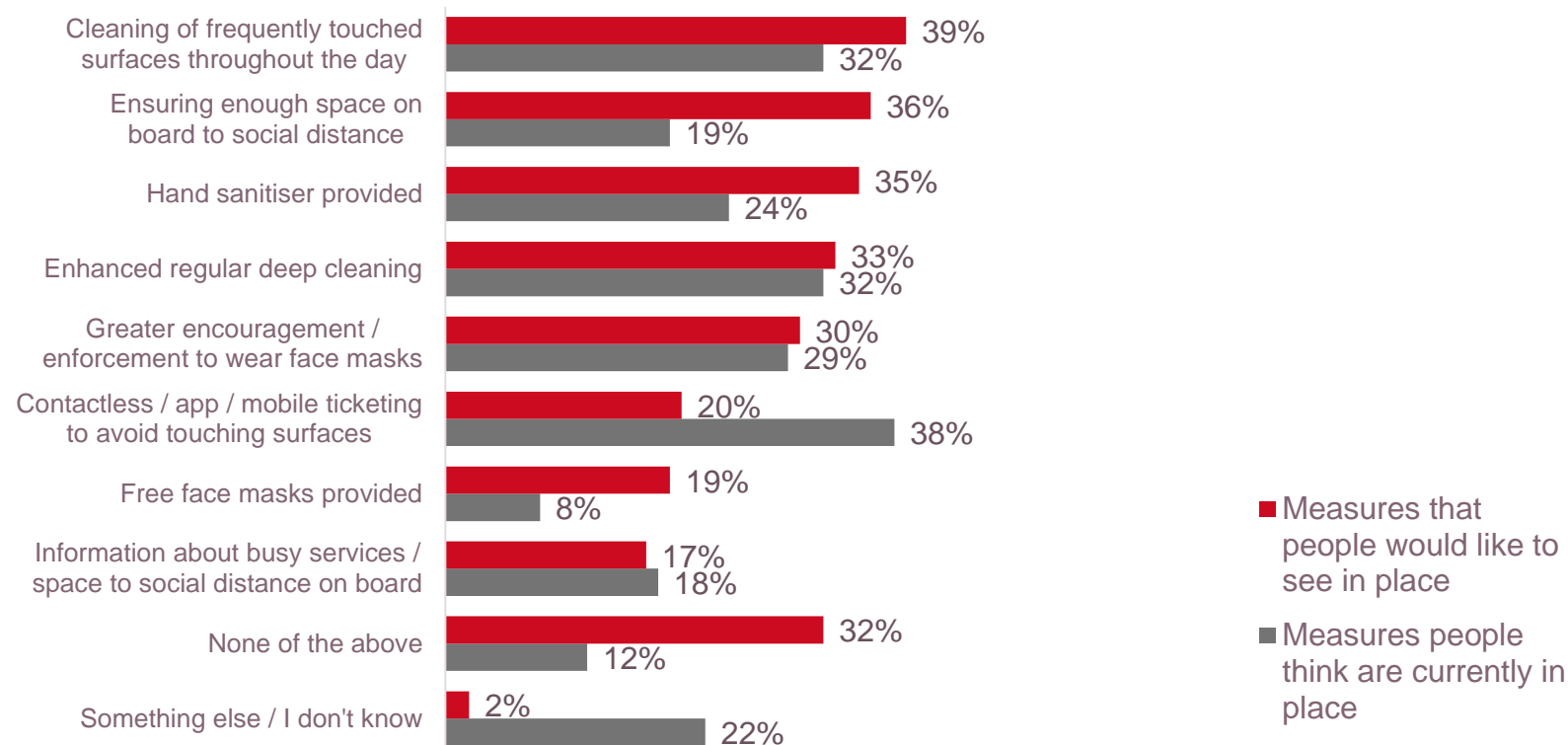
Base: W59 only. Spring back Socialisers (308)



**More than a third of those who are Carefree and Carrying On would like to see enough space to social distance ensured on public transport to make them feel more comfortable, though 19 per cent think this measure is currently in place**

**Which of the following measures do you need to see in place to feel more comfortable travelling on public transport?**

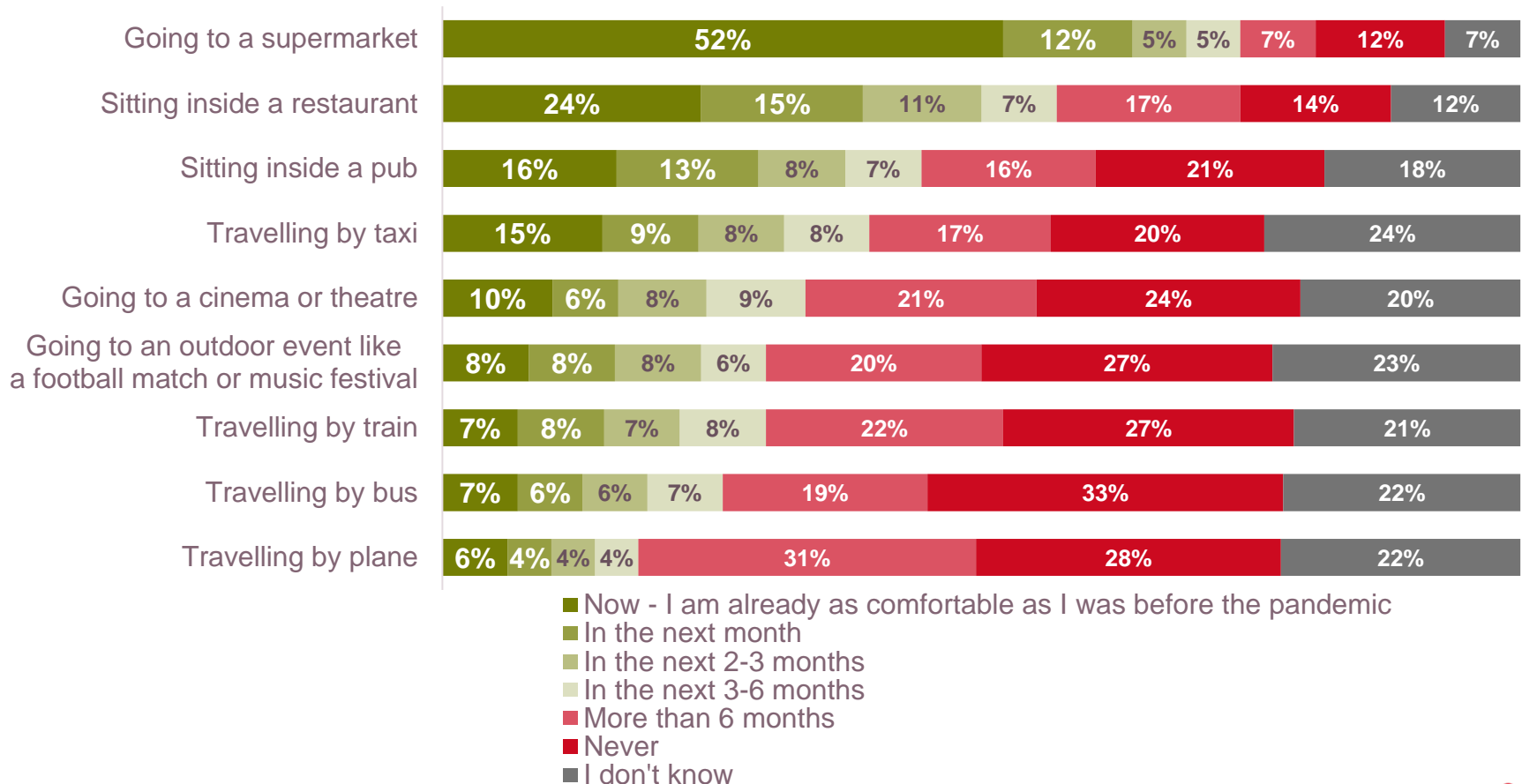
**And which of the following measures do you think are currently in place on public transport?**



Base: W59 only. Carefree and Carrying On (651)

## Three in ten, or fewer, Cautious Car Choosers say that they will feel as comfortable using a train or a bus within the next six months as they did before the pandemic

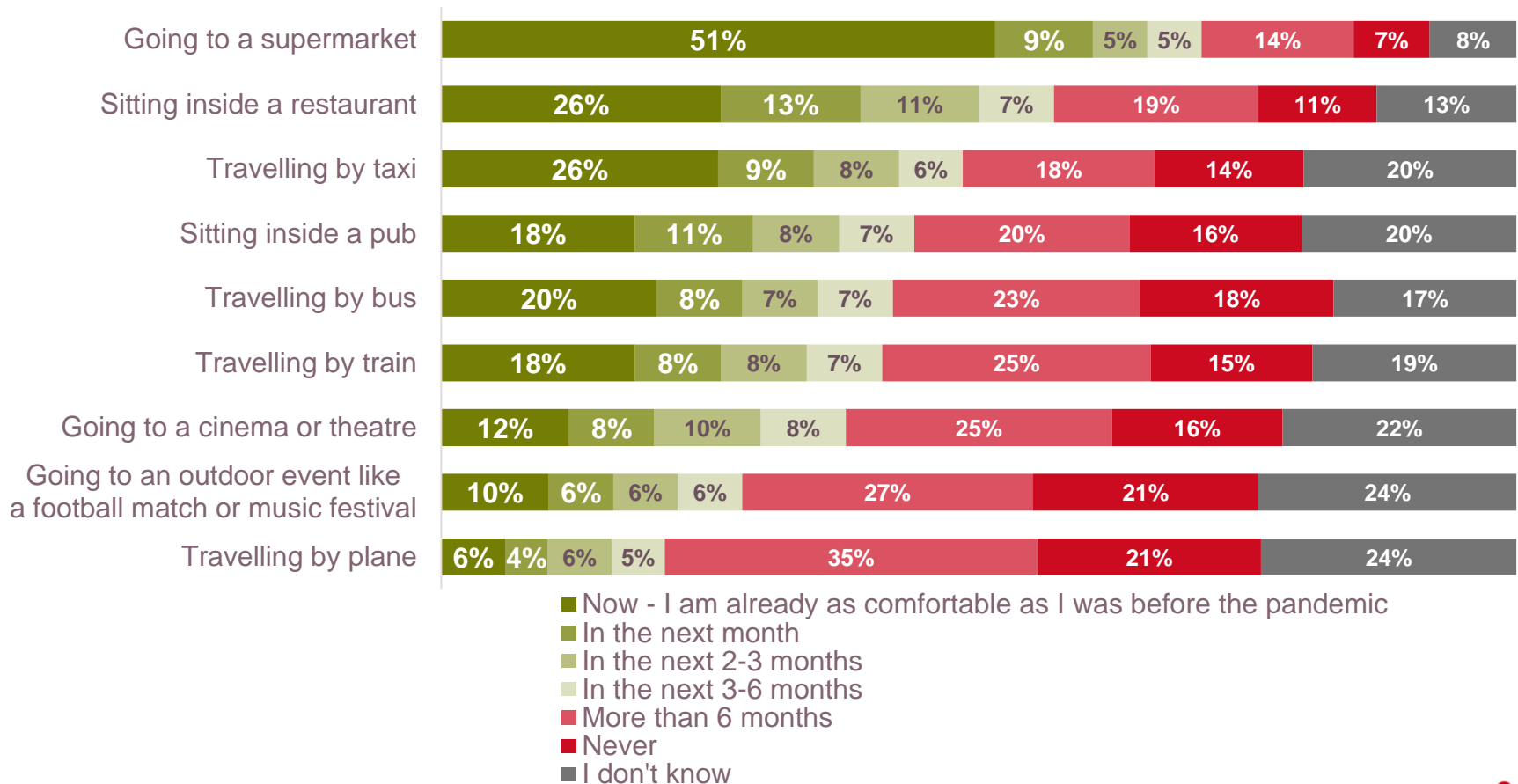
When do you think you will feel as comfortable doing each of the following activities as you felt before the Covid-19 pandemic?



Base: w58 and w59 aggregated. Cautious Car Choosers (828)

## Around two in five of those who are Anxious and Affected say that they will feel as comfortable using a train or a bus within the next six months as they did before the pandemic

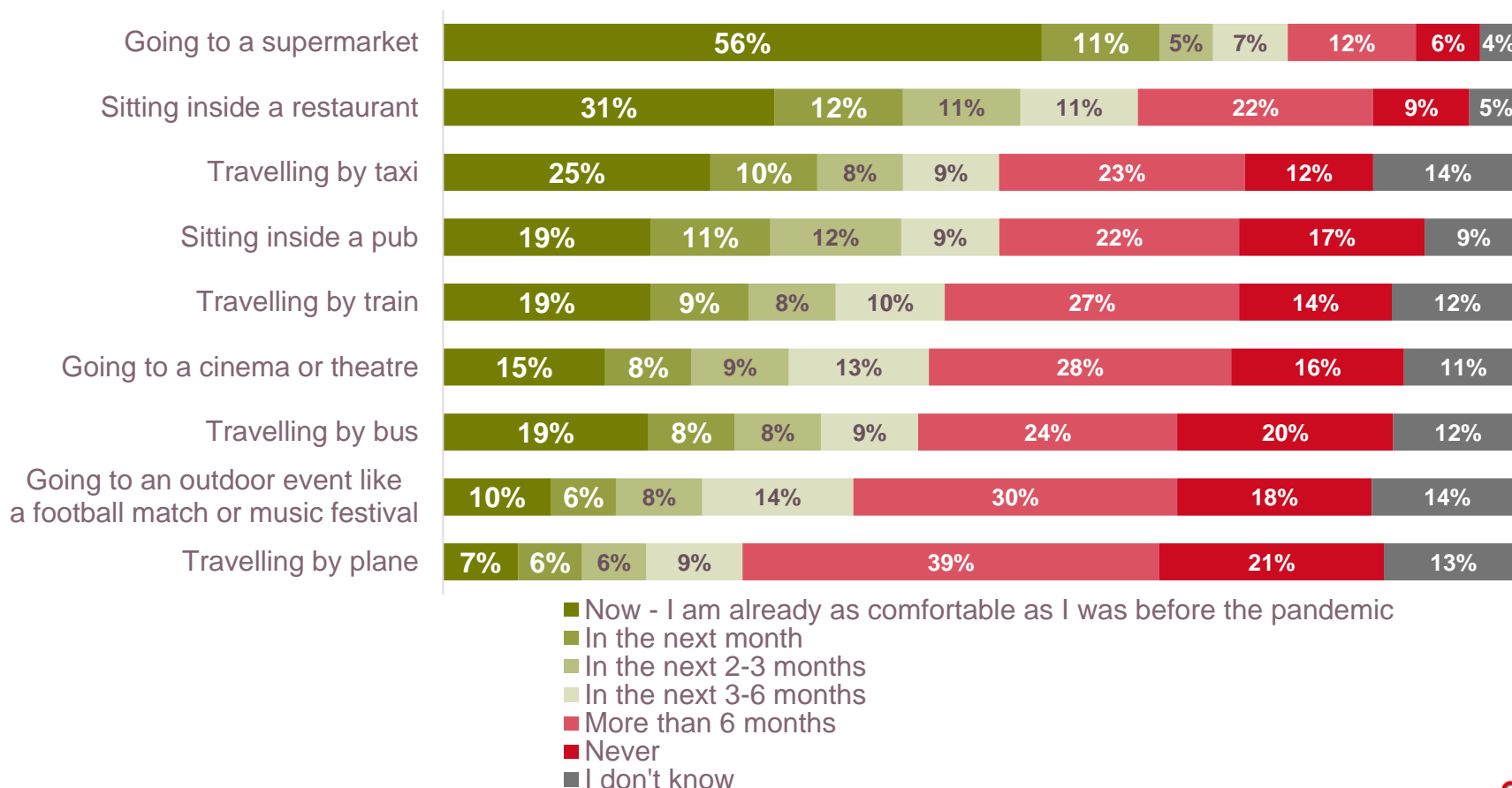
When do you think you will feel as comfortable doing each of the following activities as you felt before the Covid-19 pandemic?



Base: w58 and w59 aggregated. Anxious and Affected (748)

## More than two in five of Rethinking Reducers say that they will feel as comfortable using a train or a bus within the next six months as they did before the pandemic

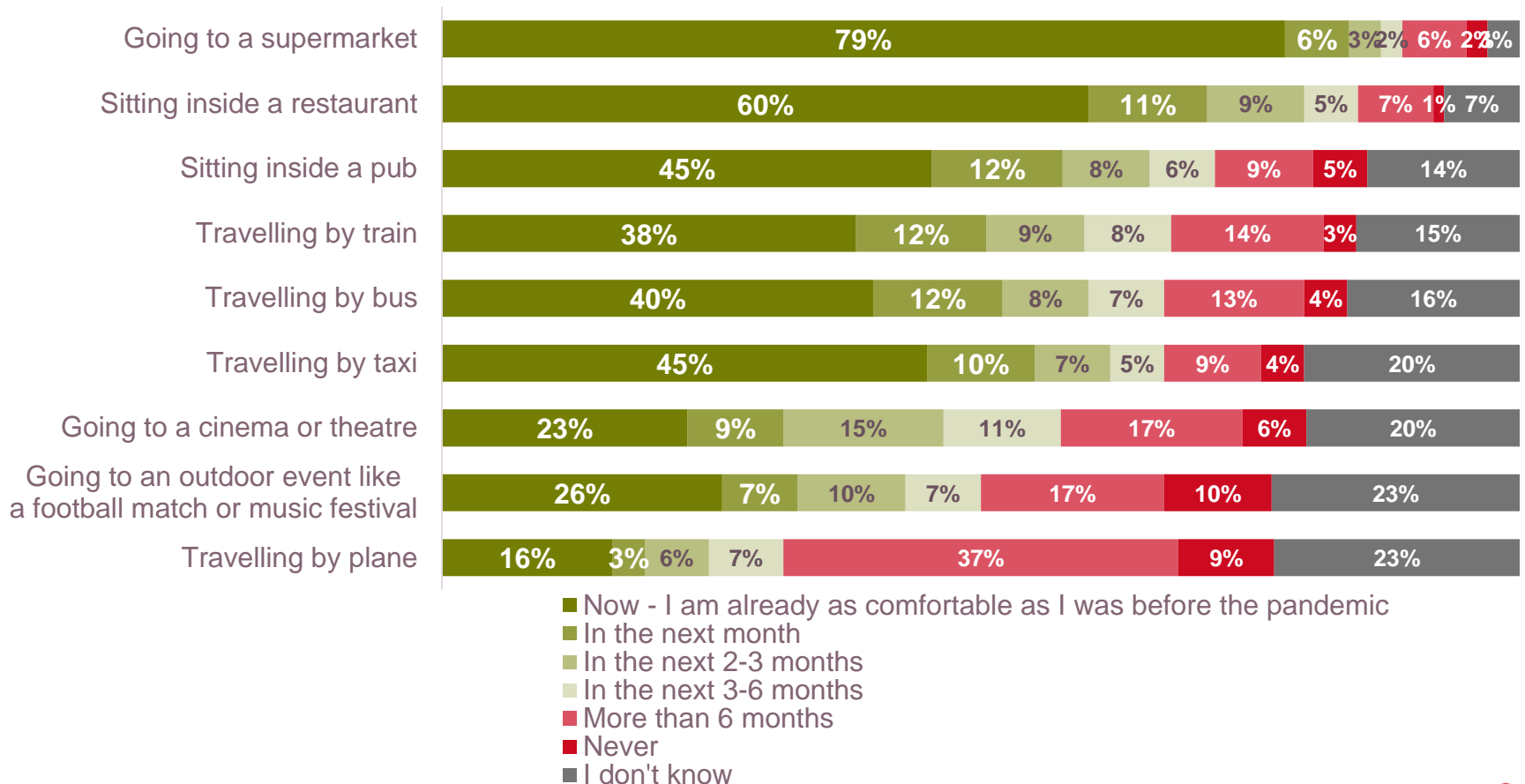
When do you think you will feel as comfortable doing each of the following activities as you felt before the Covid-19 pandemic?



Base: w58 and w59 aggregated. Rethinking Reducers (378)

## Two thirds of those who are Spring Back Socialisers say that they will feel as comfortable using a train or a bus within the next six months as they did before the pandemic

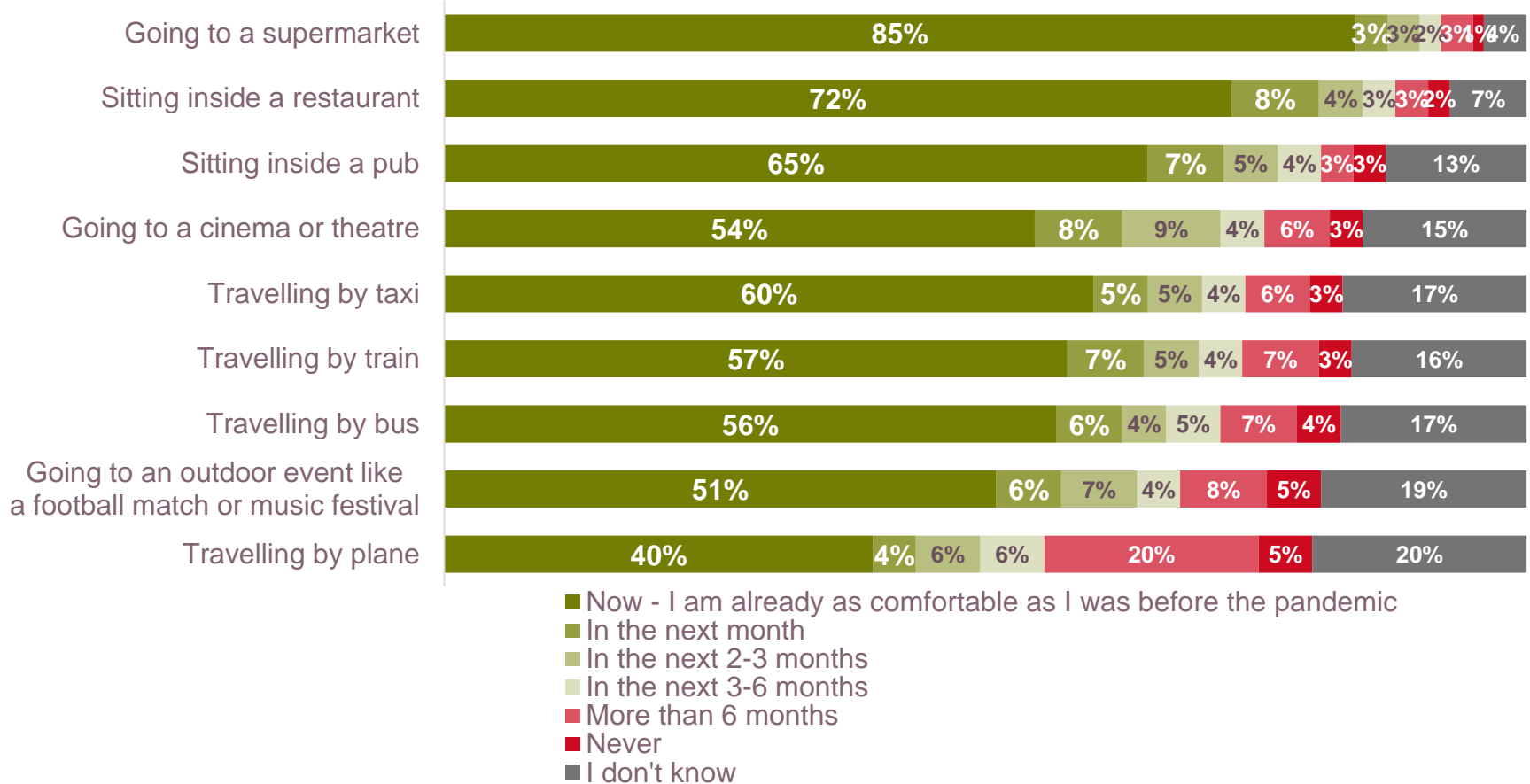
When do you think you will feel as comfortable doing each of the following activities as you felt before the Covid-19 pandemic?



Base: w58 and w59 aggregated. Spring-back Socialisers (701)

## More than seven in ten of those who are Carefree and Carrying On say that they will feel as comfortable using a train or a bus within the next six months as they did before the pandemic

When do you think you will feel as comfortable doing each of the following activities as you felt before the Covid-19 pandemic?



Base: w58 and w59 aggregated. Carefree and Carrying On (1,320)

## Satisfaction with aspects of train and bus journeys by segment

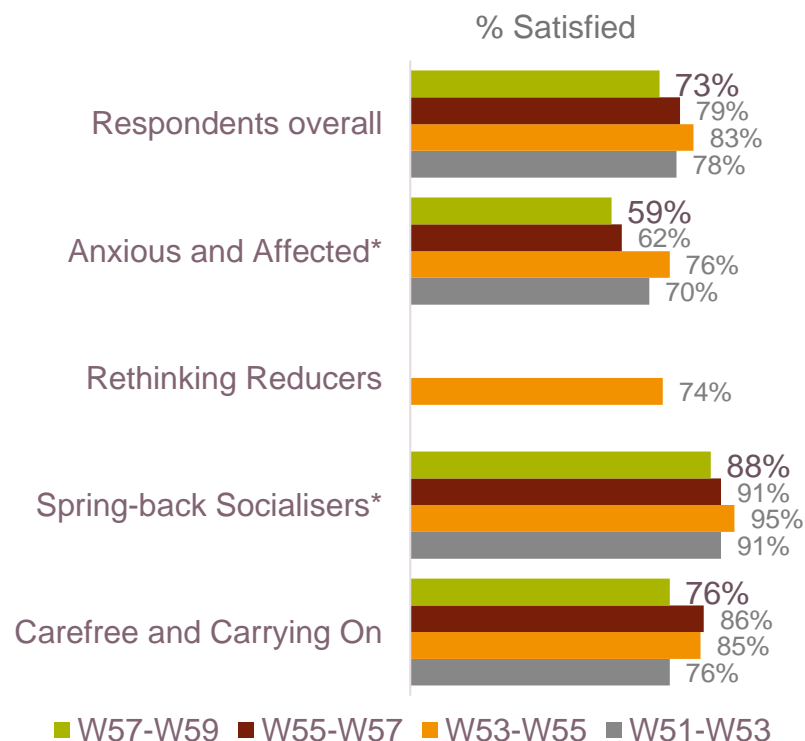
The section of the report below contains an analysis of the differing levels of satisfaction with various aspects of train and bus journeys between segments. Unlike elsewhere in this report, these findings are presented in terms of three waves of aggregated omnibus data. The most recent data combines waves 57, 58 and 59 which cover train and bus journeys made between 23 July and 1 August, the 6-15 August, and 20-29 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.

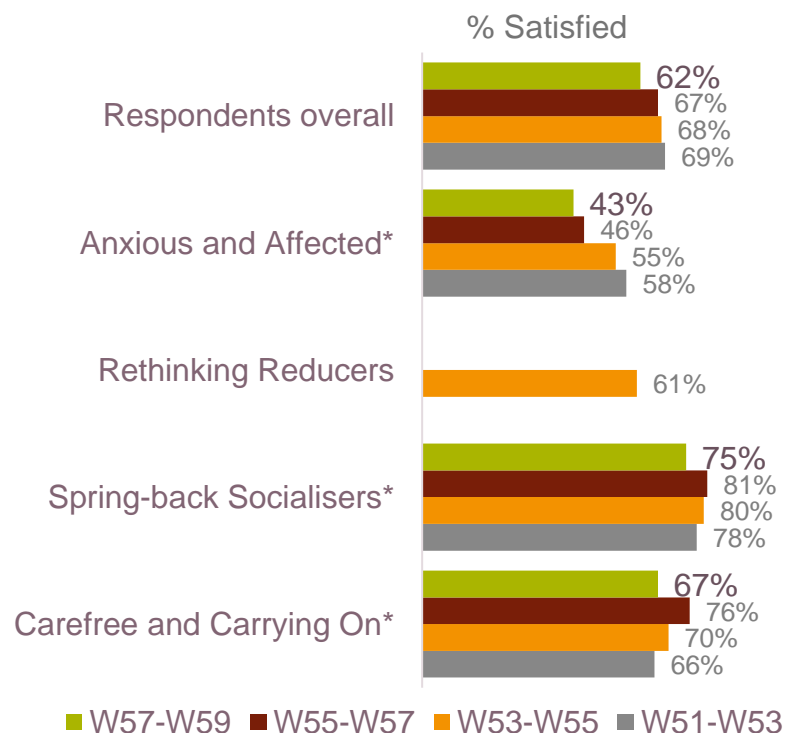
# Spring-back Socialisers are more likely than others to be satisfied with their train journey overall and the behaviour of other passengers. Those who are Anxious and Affected are least likely to be satisfied.

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

## Overall satisfaction



## Other passenger behaviour



Base: w57-w59 aggregated. Those who used a train between 23<sup>rd</sup> July – 1<sup>st</sup> August 2021 / 6-15 August / 20-29 August (562).

Anxious and Affected (162), Spring-back Socialisers (93), Carefree and Carrying On (214)

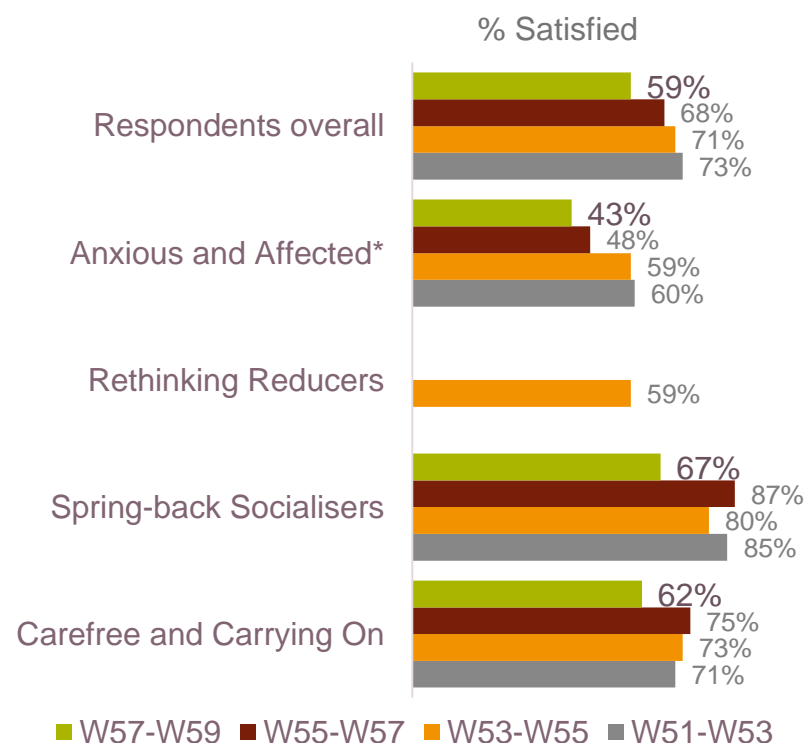
\* Denotes statistically significant difference from respondents overall.



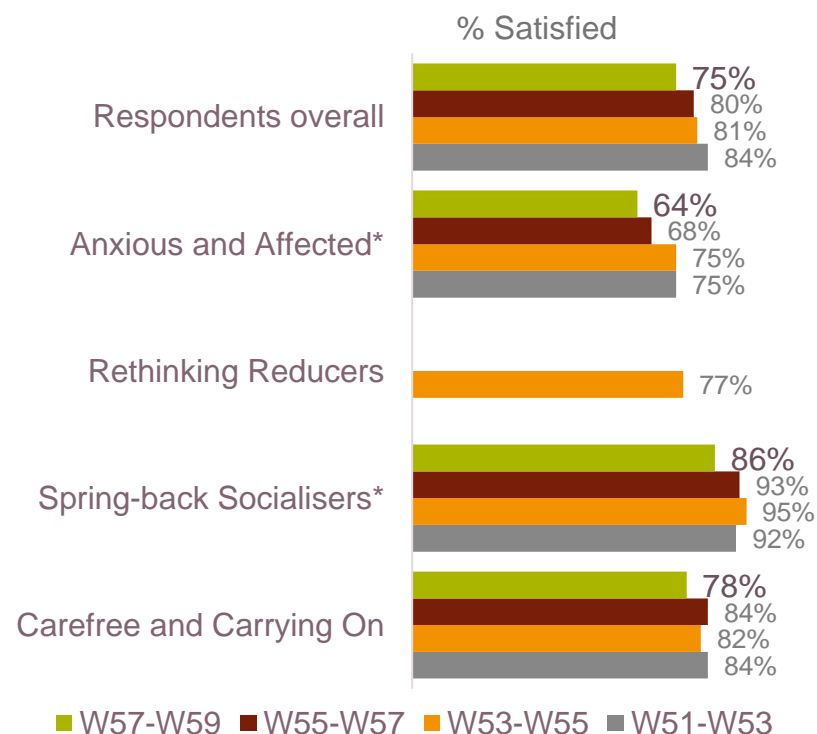
# Those who are Anxious and Affected are least likely to be satisfied with the number of people wearing face coverings and with the cleanliness of the train.

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

## Number of people wearing face coverings



## Cleanliness



Base: w57-w59 aggregated. Those who used a train between 23<sup>rd</sup> July – 1<sup>st</sup> August 2021 / 6-15 August / 20-29 August (562).

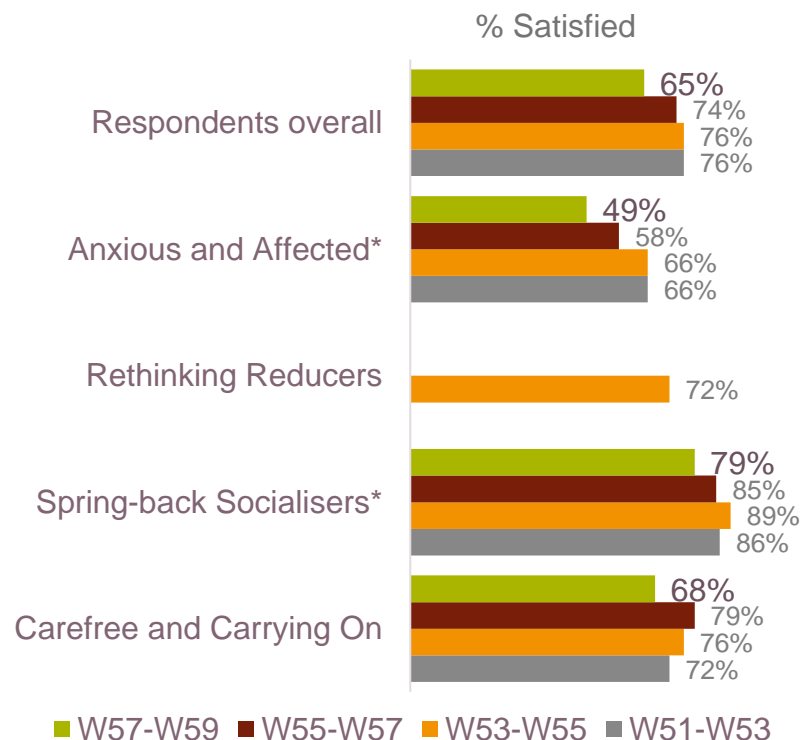
Anxious and Affected (162), Spring-back Socialisers (93), Carefree and Carrying On (214)

\* Denotes statistically significant difference from respondents overall.

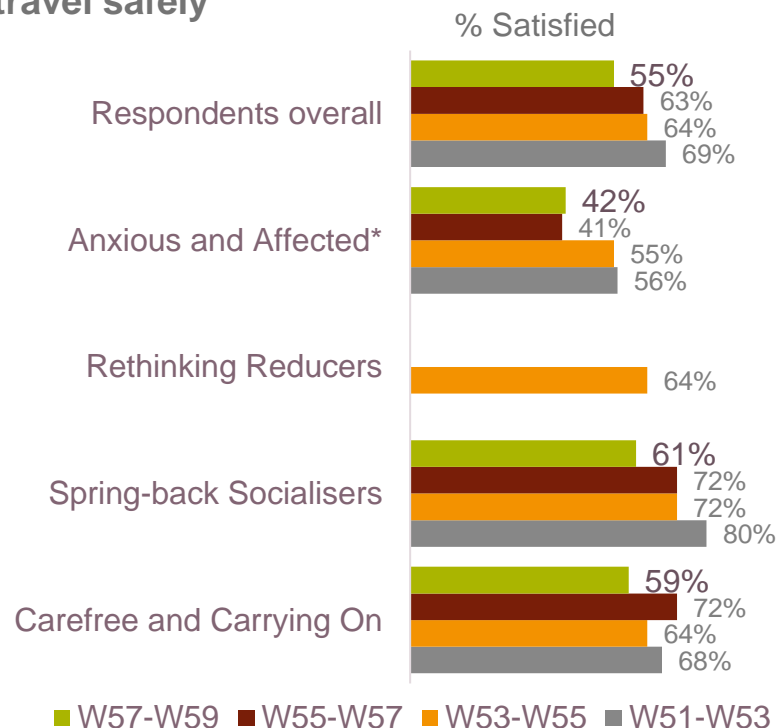
**Spring-back Socialisers are more likely than others to be satisfied with the ability to keep a safe distance. Those who are Anxious and Affected are least likely to be satisfied with both this and what the operator did to help passengers to travel safely.**

## 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: w57-w59 aggregated. Those who used a train between 23<sup>rd</sup> July – 1<sup>st</sup> August 2021 / 6-15 August / 20-29 August (562).

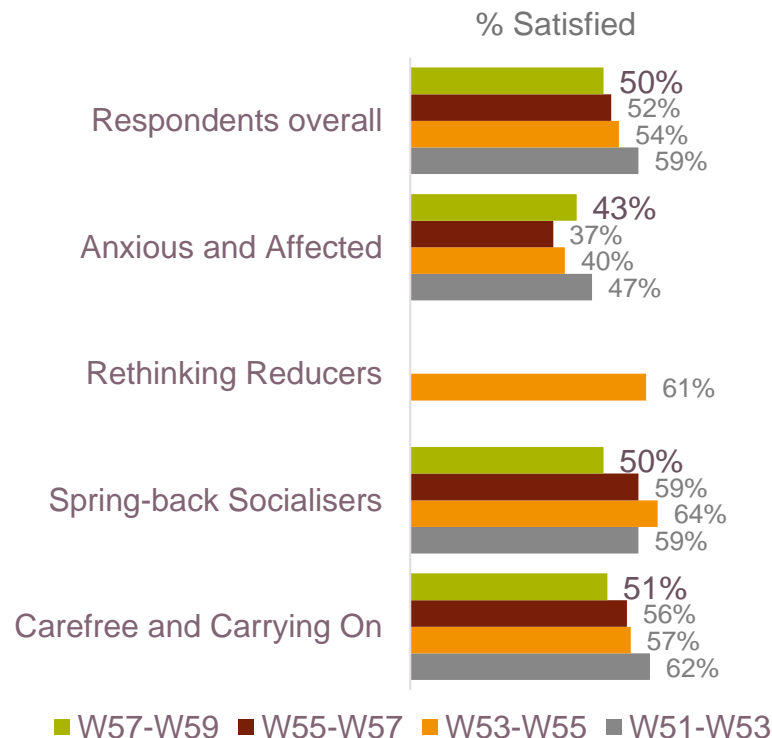
Anxious and Affected (162), Spring-back Socialisers (93), Carefree and Carrying On (214)

\* Denotes statistically significant difference from respondents overall.

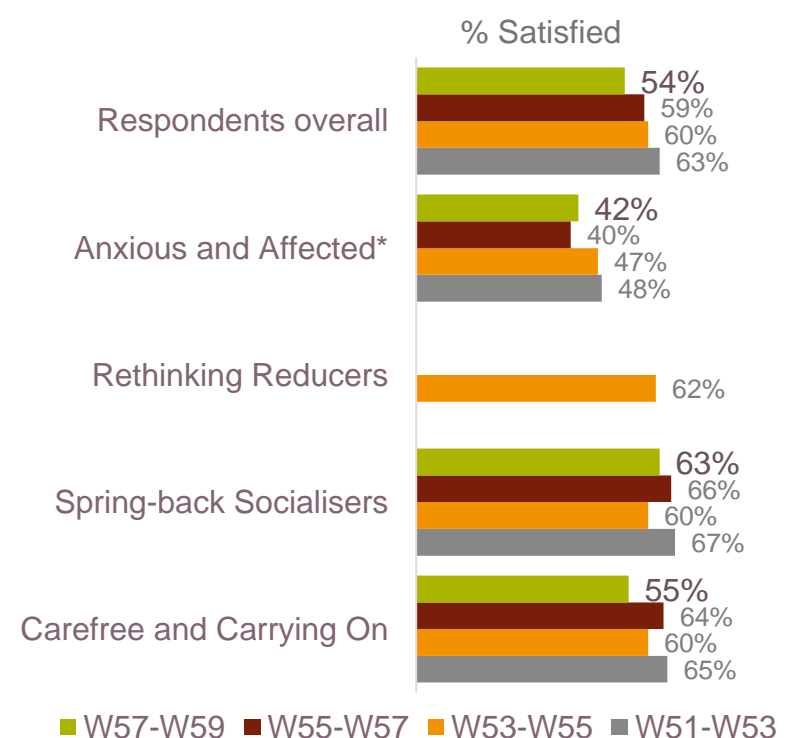
# Those who are Anxious and Affected are least likely than others to be satisfied with how the staff helped them to feel safe during the journey

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

## Ease of finding out how busy



## How staff helped you to feel safe



Base: w57-w59 aggregated. Those who used a train between 23<sup>rd</sup> July – 1<sup>st</sup> August 2021 / 6-15 August / 20-29 August (562).

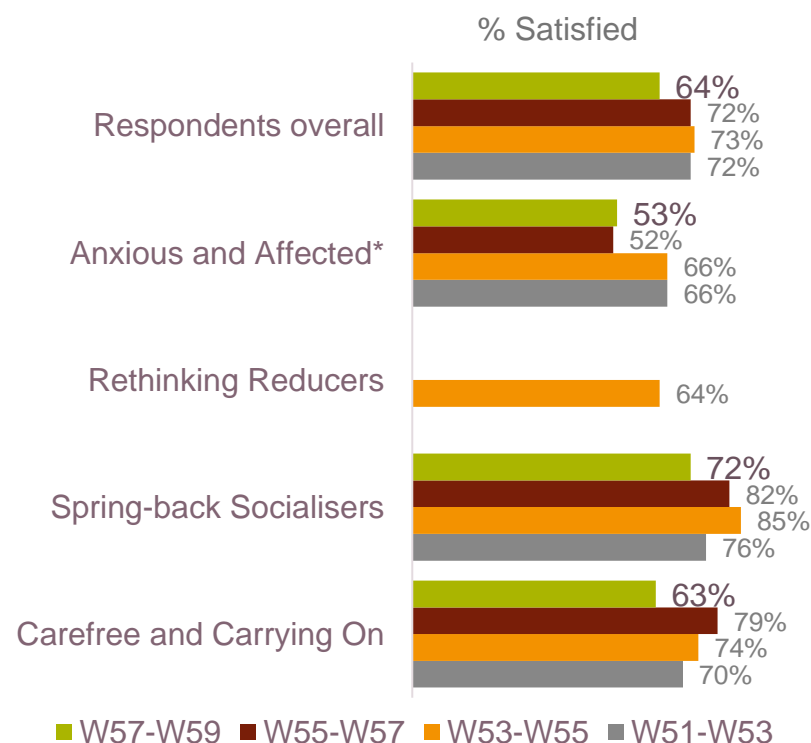
Anxious and Affected (162), Spring-back Socialisers (93), Carefree and Carrying On (214)

\* Denotes statistically significant difference from respondents overall.

## Those who are Anxious and Affected are least 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: w57-w59 aggregated. Those who used a train between 23<sup>rd</sup> July – 1<sup>st</sup> August 2021 / 6-15 August / 20-29 August (562).

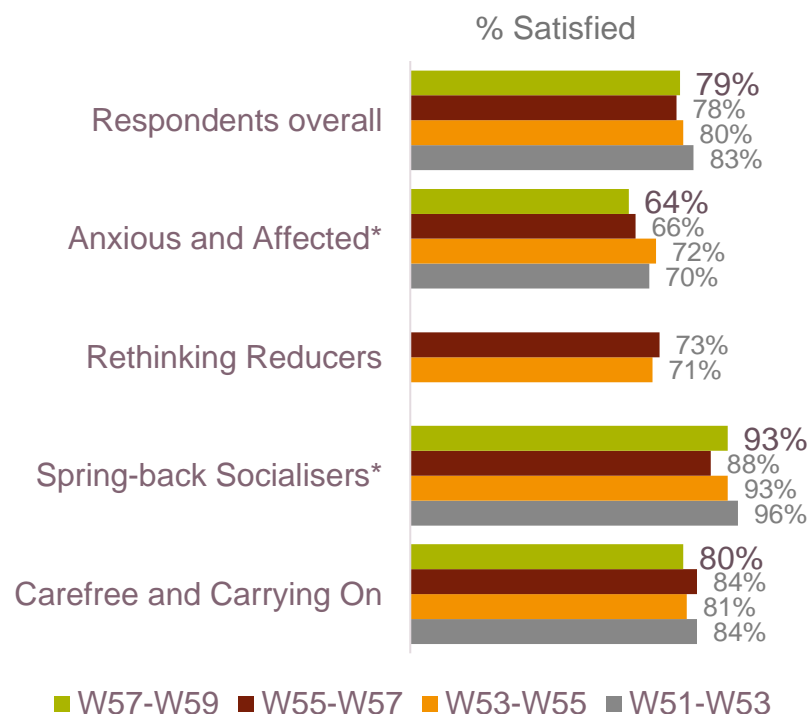
Anxious and Affected (162), Spring-back Socialisers (93), Carefree and Carrying On (214)

\* Denotes statistically significant difference from respondents overall.

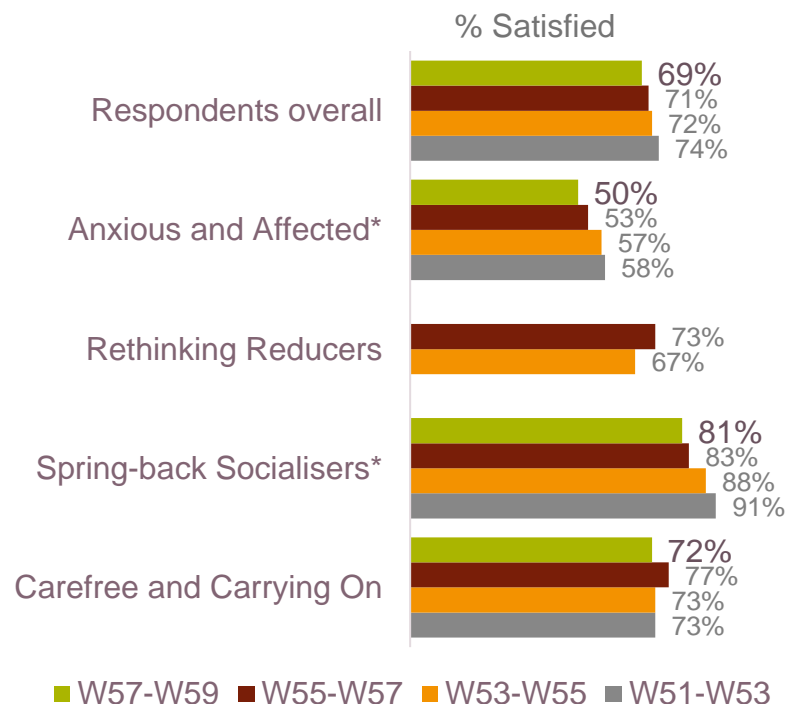
**Spring-back Socialisers are more likely than others to be satisfied with bus journey overall, and to be satisfied with the behaviour of other passengers. Those who are Anxious and Affected are the least likely to be satisfied.**

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

### Overall satisfaction



### Other passenger behaviour



Base: w57-w59 aggregated. Those who used a train between 23<sup>rd</sup> July – 1<sup>st</sup> August 2021 / 6-15 August / 20-29 August (562).

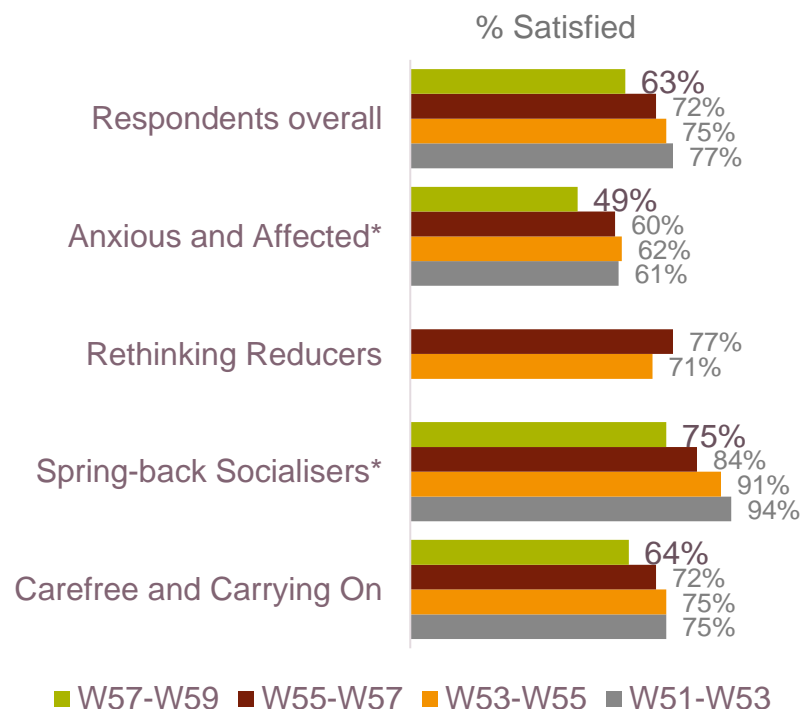
Anxious and Affected (162), Spring-back Socialisers (93), Carefree and Carrying On (214)

\* Denotes statistically significant difference from respondents overall.

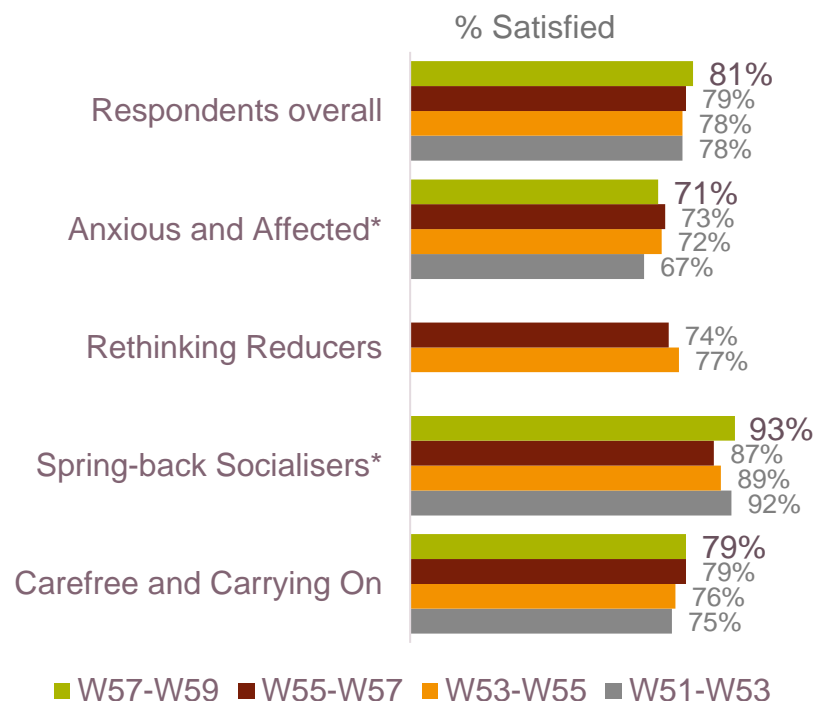
**Spring-back Socialisers are more likely than others to be satisfied with the number of people wearing face coverings, and to be satisfied with the cleanliness of the bus. Those who are Anxious and Affected are the least likely to be satisfied.**

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

### Number of people wearing face coverings



### Cleanliness



Base: w57-w59 aggregated. Those who used a train between 23<sup>rd</sup> July – 1<sup>st</sup> August 2021 / 6-15 August / 20-29 August (562).

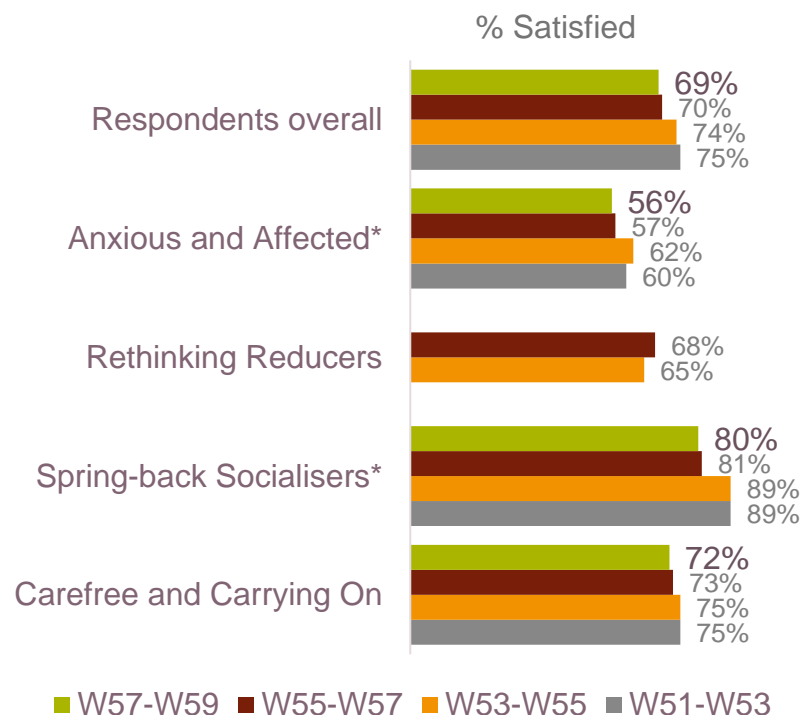
Anxious and Affected (162), Spring-back Socialisers (93), Carefree and Carrying On (214)

\* 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: w57-w59 aggregated. Those who used a train between 23<sup>rd</sup> July – 1<sup>st</sup> August 2021 / 6-15 August / 20-29 August (562).

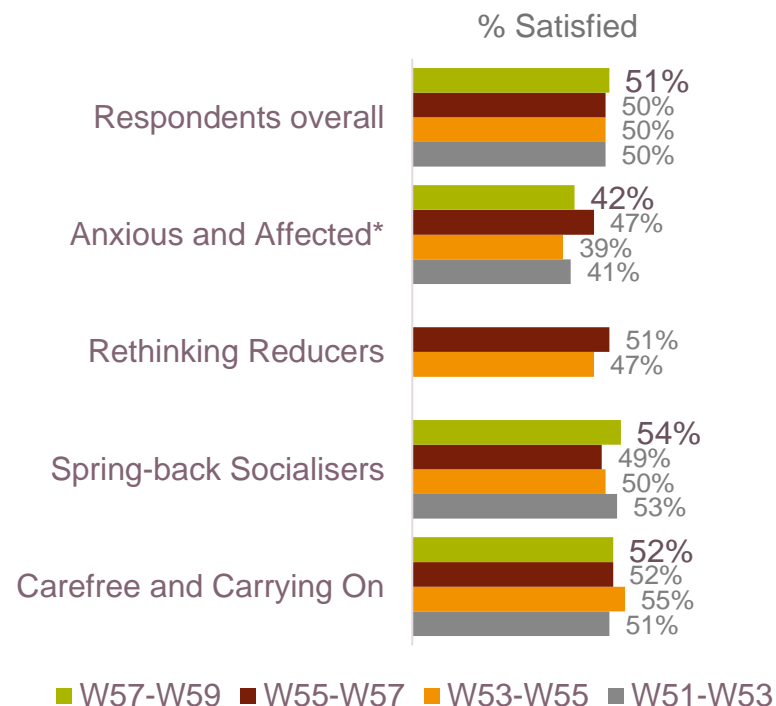
Anxious and Affected (162), Spring-back Socialisers (93), Carefree and Carrying On (214)

\* Denotes statistically significant difference from respondents overall.

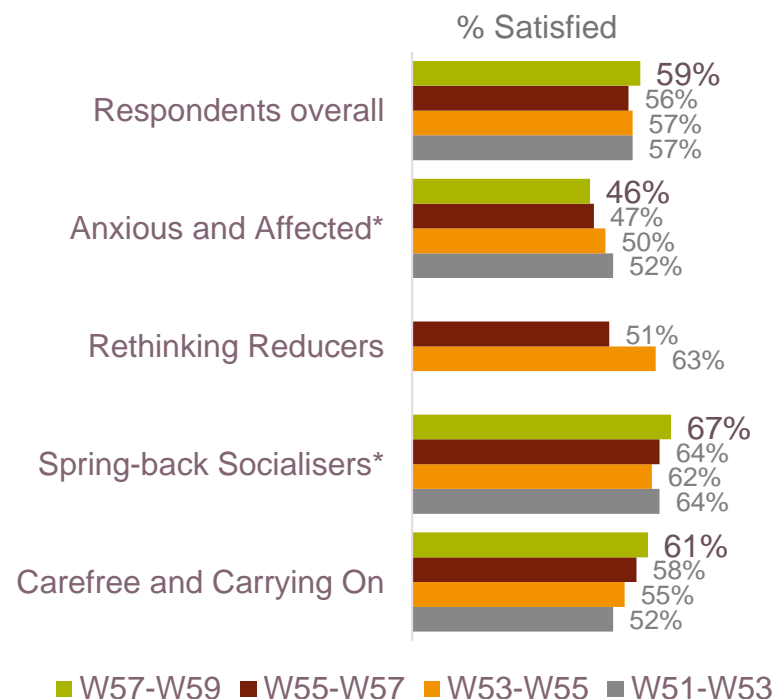
**Those who are Anxious and Affected are least likely to be satisfied with the ease of finding out how busy the train was. Spring-back Socialisers are more likely than others to be satisfied with the how the staff helped them to feel safe during the journey.**

## 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: w57-w59 aggregated. Those who used a train between 23<sup>rd</sup> July – 1<sup>st</sup> August 2021 / 6-15 August / 20-29 August (562).

Anxious and Affected (162), Spring-back Socialisers (93), Carefree and Carrying On (214)

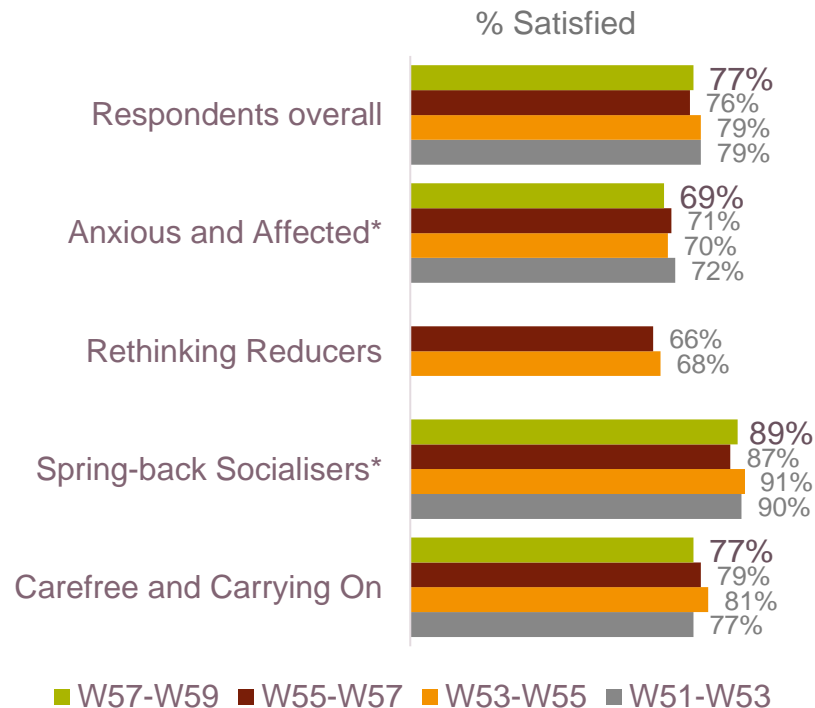
\* Denotes statistically significant difference from respondents overall.



## 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: w57-w59 aggregated. Those who used a train between 23<sup>rd</sup> July – 1<sup>st</sup> August 2021 / 6-15 August / 20-29 August (562).

Anxious and Affected (162), Spring-back Socialisers (93), Carefree and Carrying On (214)

\* Denotes statistically significant difference from respondents overall.

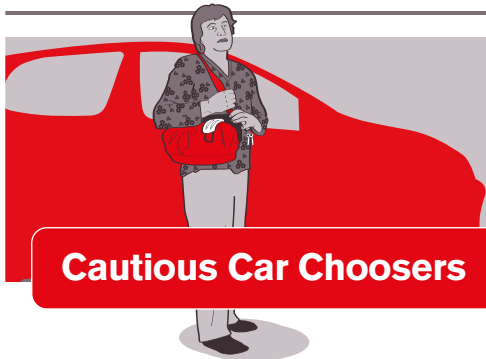
# Meet our segments



**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



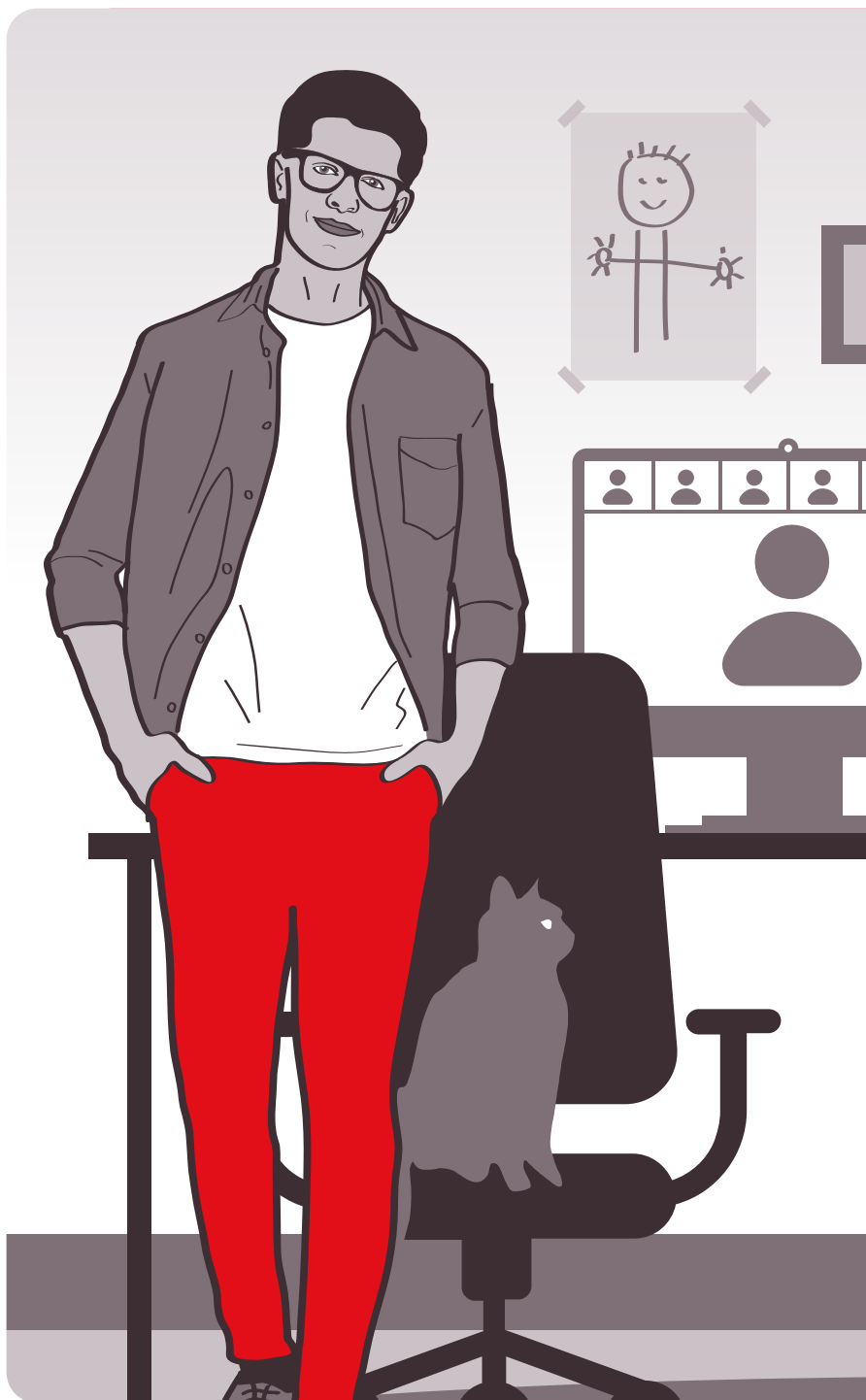
Are more likely to be reliant on public transport. They used public transport regularly before March 2020 but do not expect to be using it as much in the future.



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 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 58 / 59	4,090	828	748	378	701	1,320	115



## 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.**