

# Covid-19 travel segmentation

10 - 26 September analysis  
October 2021



# Confidence returning as autumn begins?

This latest report shows how our five segments (see page 26) have been feeling in September. In terms of Covid-19 this has been a period of relative stability. Schools and universities have returned, and we know more people have started commuting regularly again. At the same time, the pandemic has begun to feature less prominently in the news headlines. Overall, life has continued to move closer towards a stable normal. How have our different segments responded?

Every segment has travelled more by public transport in the second half of September. Four in 10 of the Anxious and Affected used public transport in the last seven days in this period, the highest usage of any segment. The Rethinking Reducers remain true to their name, with only a small decrease as they appear to continue to minimise travel where they can. Half of the Carefree and Carrying On travelled to work, again an increase on the start of September.

There are very welcome signs of growing confidence across the segments. The long-term trend for fewer people to say they are avoiding public transport continues. Though the Anxious and Affected stand out, with a small increase in this measure and one in three still maintaining they are not using public transport because it is not safe.

Continues on page 2.

# Confidence returning as Autumn begins?

Among those that have not travelled in the last seven days it's increasingly clear there are two distinct camps. The Cautious Car Choosers, Rethinking Reducers and Anxious and Affected have all coalesced at less than half saying they would feel safe on a train. Meanwhile confidence in safety continues to grow steadily in the Spring-back Socialisers and Carefree and Carrying On, reaching nine in 10 amongst this most confident segment.

Trends also continue away from social distancing and a requirement to wear face coverings being a condition for people to use public transport. However stark differences remain, with the proportion saying this ranging from seven in 10 Cautious Car Choosers to less than two in 10 of the Carefree and Carrying On. Fewer than half the Carefree and Carrying On now say on their last train journey they wore a face covering all the time.

Overall, the picture is increasingly positive, but the segments' attitudes are still softening slowly. The contrasting feelings of the segments and work still to do is put into perspective by looking at feelings of comfort. While more than two in three of the Carefree and Carrying On now say they feel as comfortable travelling by train or bus as before the pandemic, just one in 10 Rethinking Reducers say the same. This ongoing divide reinforces the need for transport operators to continue their remaining Covid-19 measures and keep up their communications to help more people feel comfortable travelling again.

# 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.

Between wave 59 and wave 60 some changes were made to the segmentation which are described below. The point at which the segmentation was changed is marked on the charts with a red hashed line.

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
3-5 September / 10-12 September	W60 + W61
17-19 September / 24-26 September	W62 + W63

# Changes to the segmentation

At wave 59 of the Omnibus (27-29 August 2021) we made a small improvement to the way in which the segmentation is derived. This involved removing the question ‘How soon did you, or do you expect to return to the following places?’ from the group of questions which are used to define the segments. When initially designing the segmentation, this question appropriately reflected a situation in which different sectors of society were close to opening. However, as time has moved on, and it is now more routine for people go out to do the things they did prior to the pandemic, this question felt less appropriate.

After spending some time testing different options for capturing people’s feelings around returning to activities, we have replaced the previous question with the following:

- I feel comfortable returning to the activities that I did before the pandemic (agree / disagree)
- I have returned to doing the activities that I did before the pandemic (agree / disagree)
- Thinking of each of the following activities, when do you think you will feel as comfortable doing each of them as you felt before the Covid-19 pandemic?

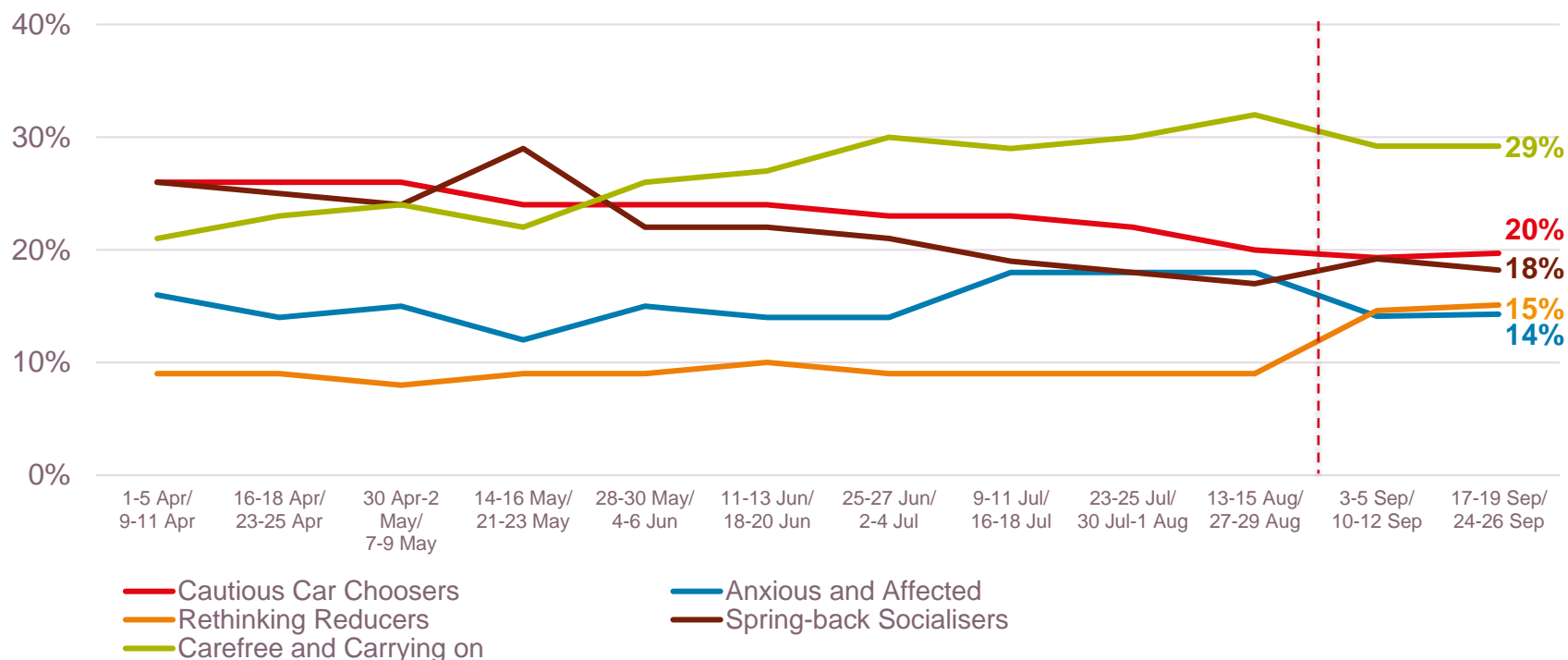
The effect of these changes is that the segmentation is now based to a greater degree on how people feel about doing the things that they did before the pandemic, rather when they will be going back to doing these things.

On the charts that follow, the point at which the segmentation changes in this way is indicated by a red hashed line. Full details on the questions which are used to define the segments is included at the end of this report.

# 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\*

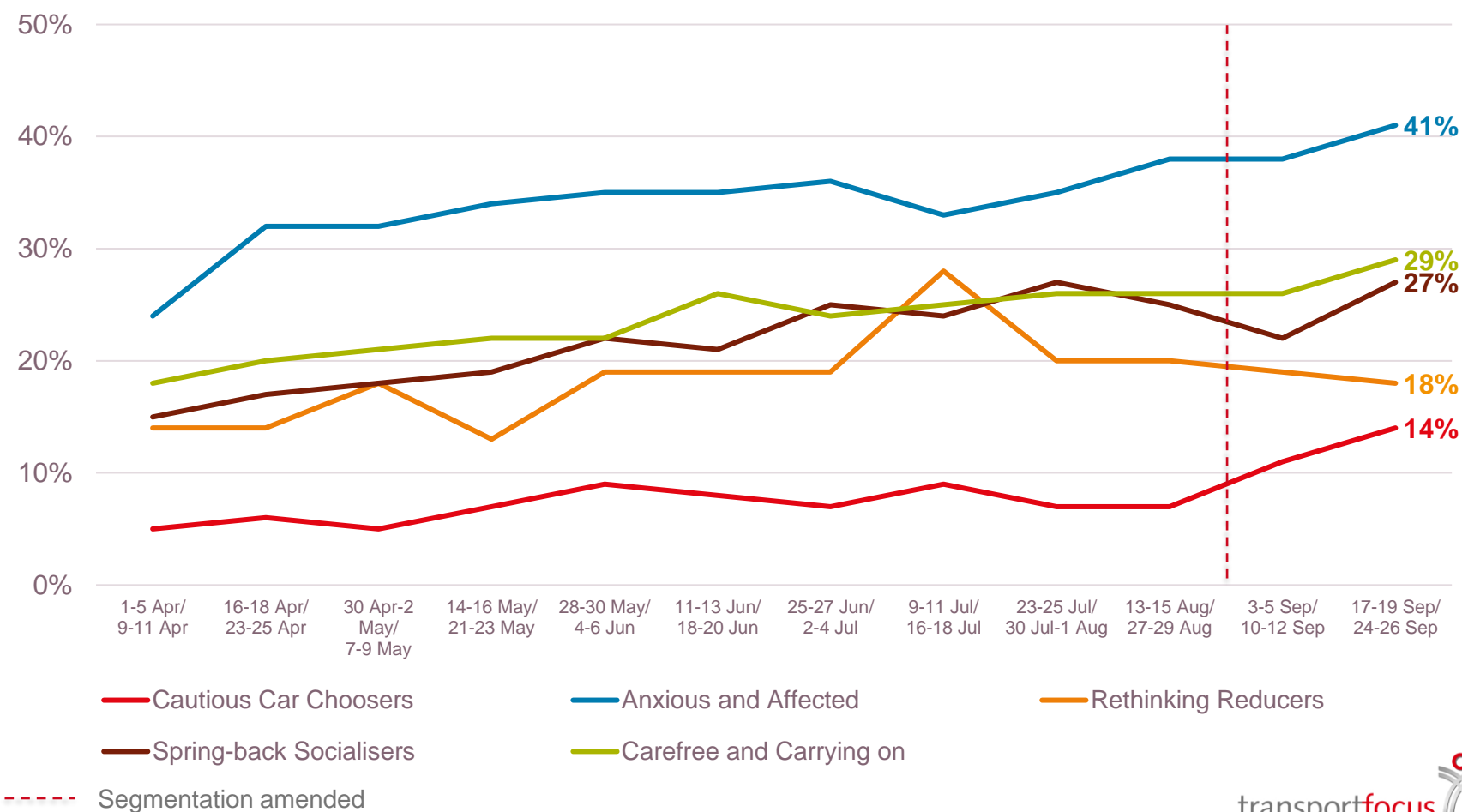


\*The size of the segments does not sum to 100% as a proportion of the sample remains unclassified in this way

----- Segmentation amended

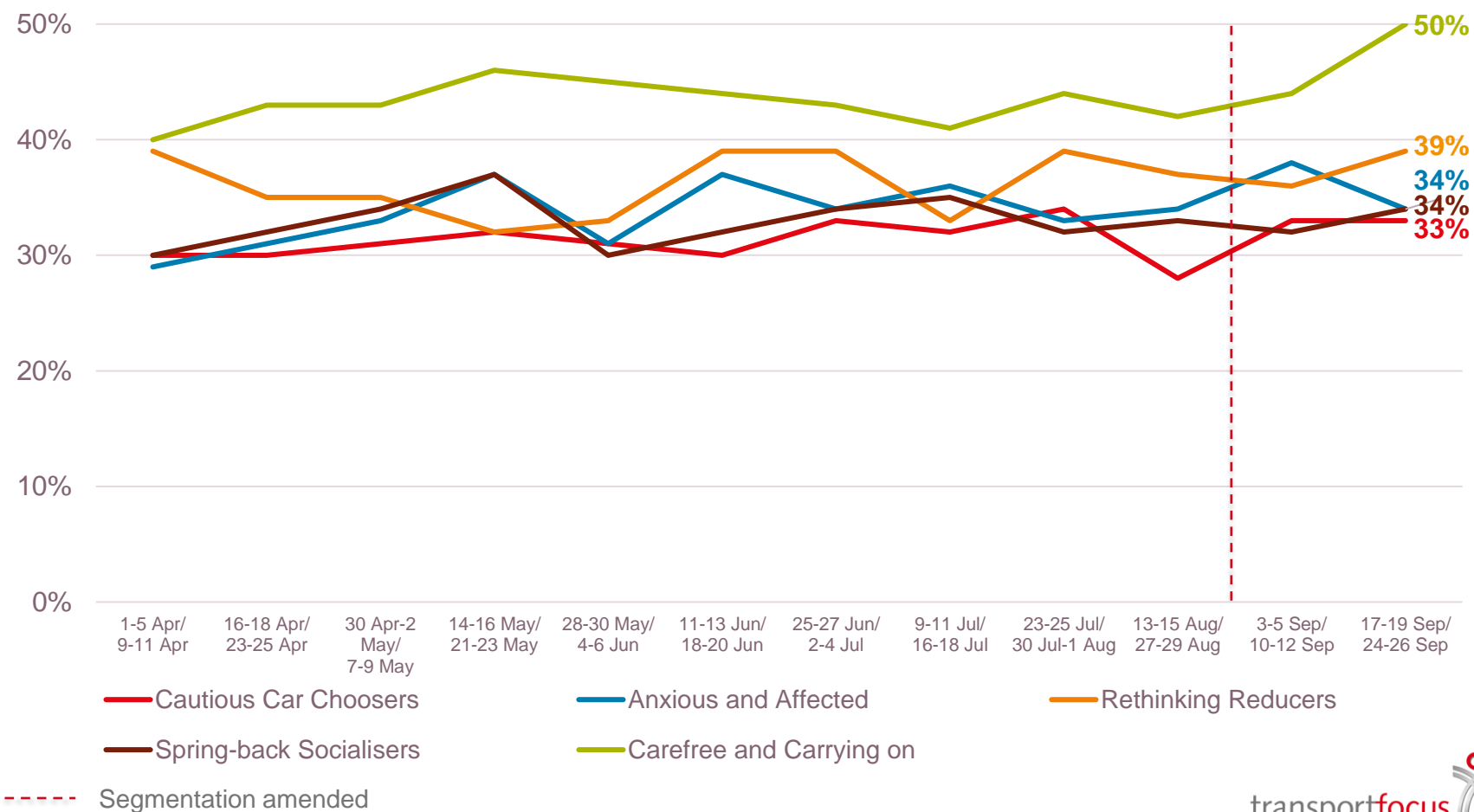
**The Anxious and Affected segment are more likely than others to have used public transport in the last seven days. There has been an increase in public transport use among most segments recently.**

### 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

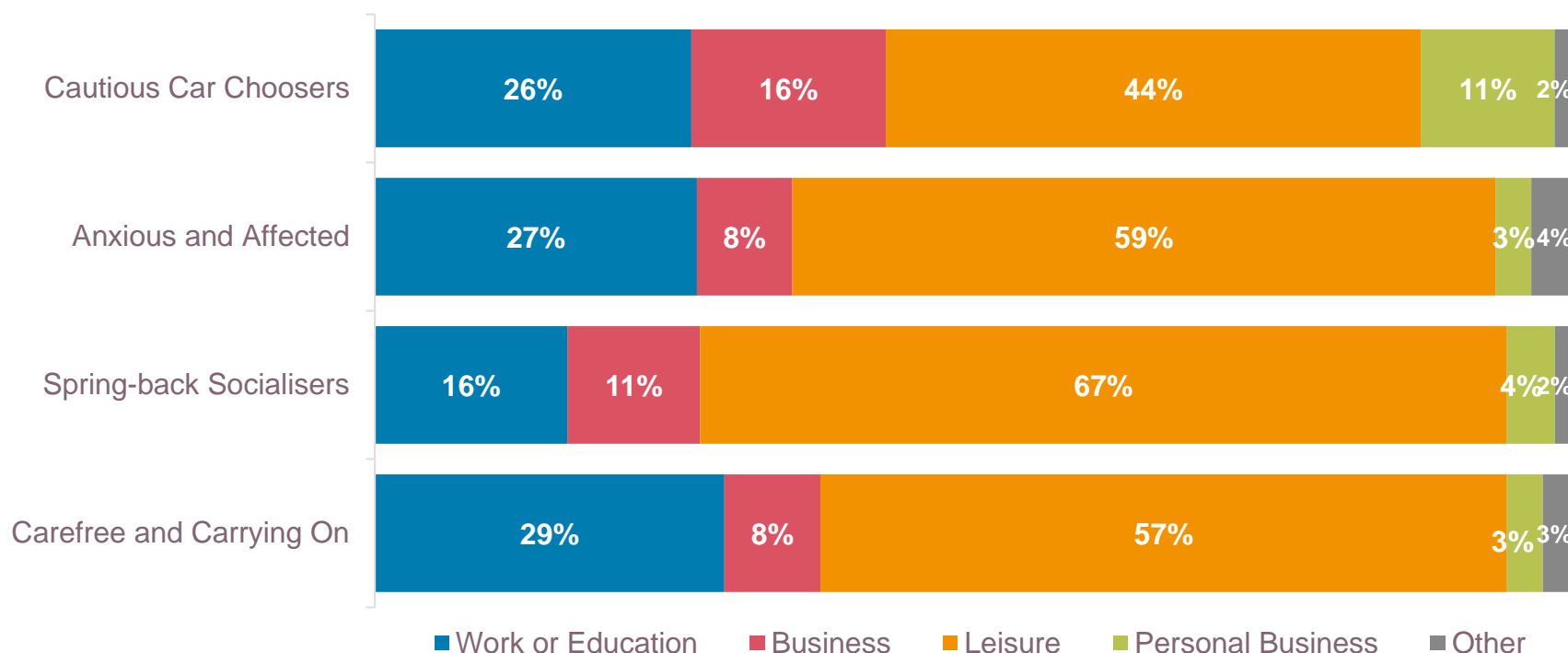
### Journeys made to or from work (by any mode of transport)





**Those who are Carefree and Carrying On 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?

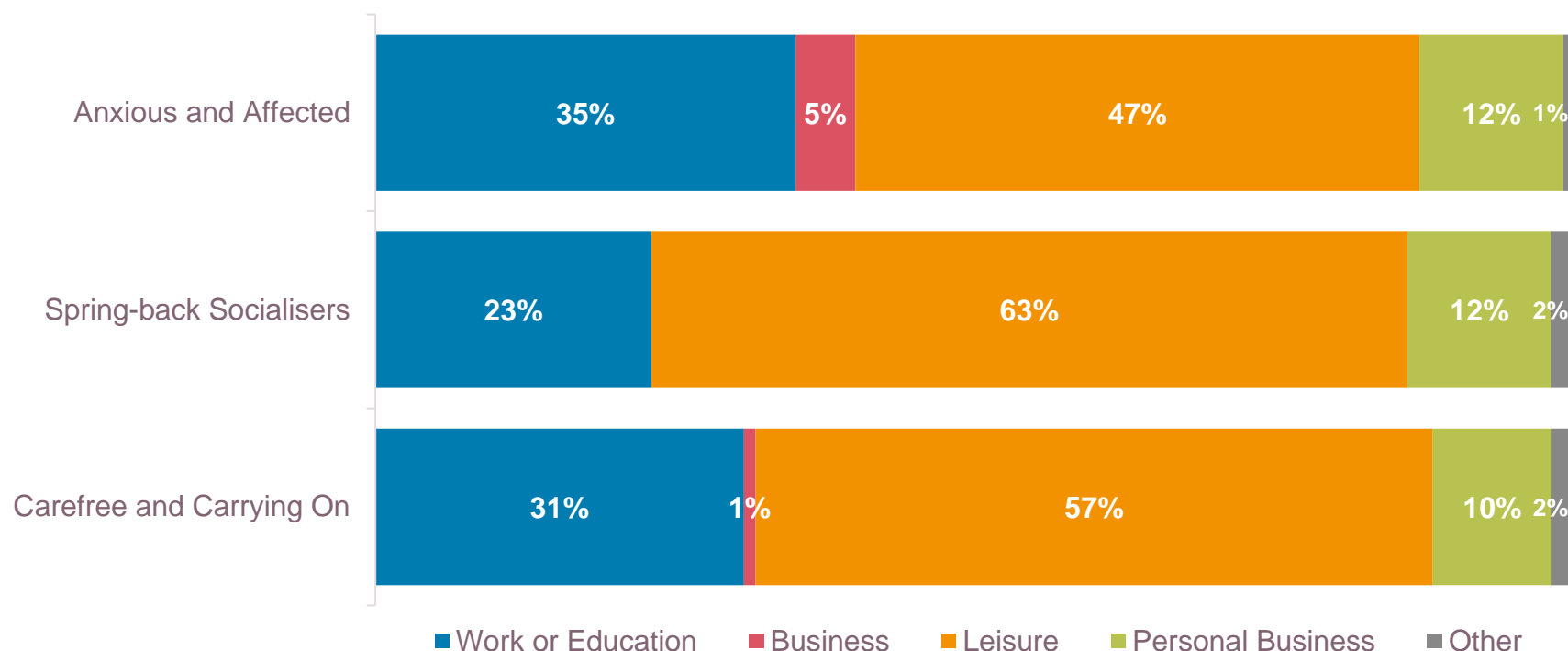


Base: Those making a journey by train. Omnibus w62-w63 aggregated. Cautious Car Choosers (55), Anxious and Affected (100), Spring-back Socialisers (70), Carefree and Carrying On (138).

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. Spring-back Socialisers are more likely to have made journeys by bus for leisure reasons.**

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?

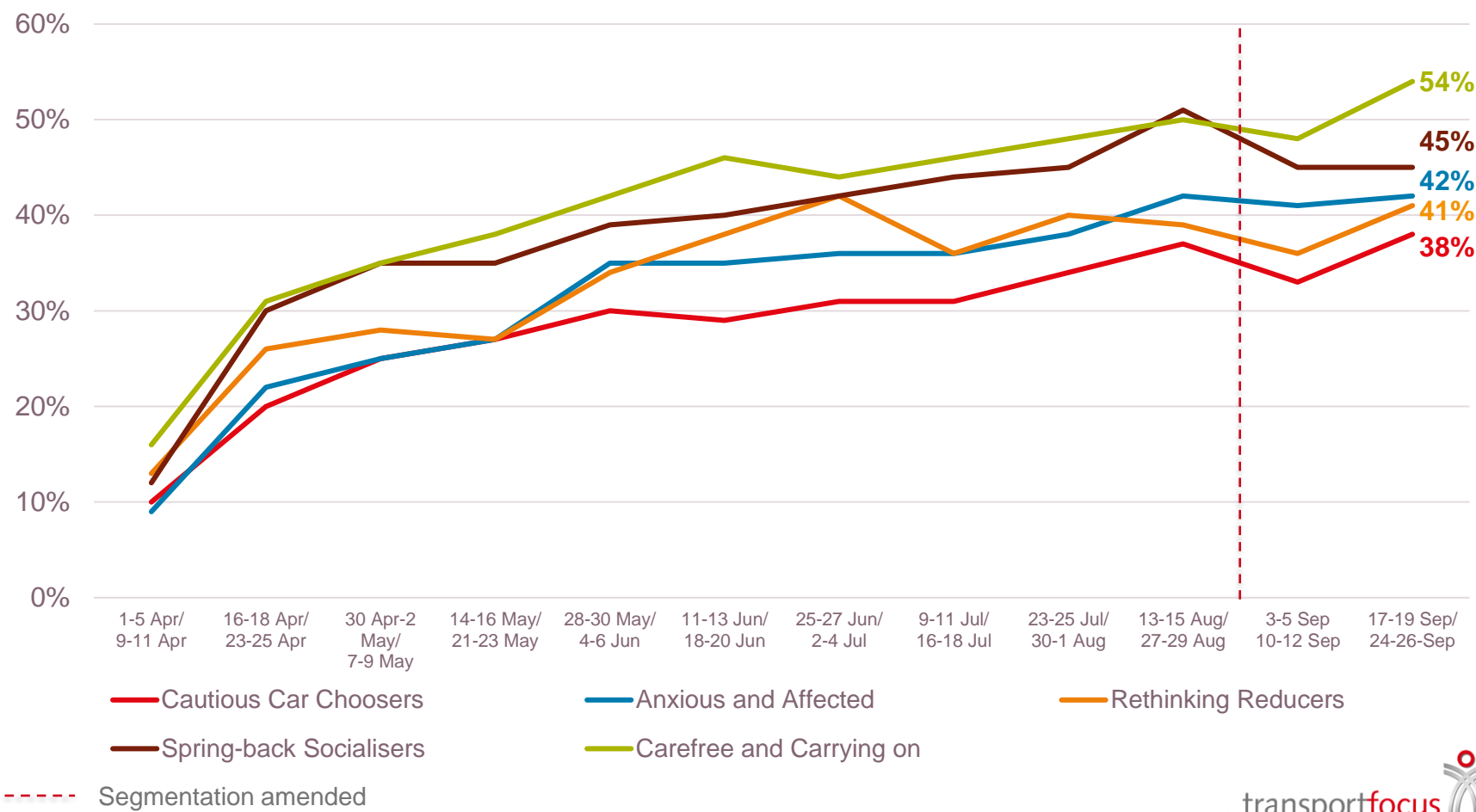


Base: Those making a journey by bus outside London. Omnibus w62-w63 aggregated. Anxious and Affected (121), Spring-back Socialisers (112), Carefree and Carrying On (181).

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

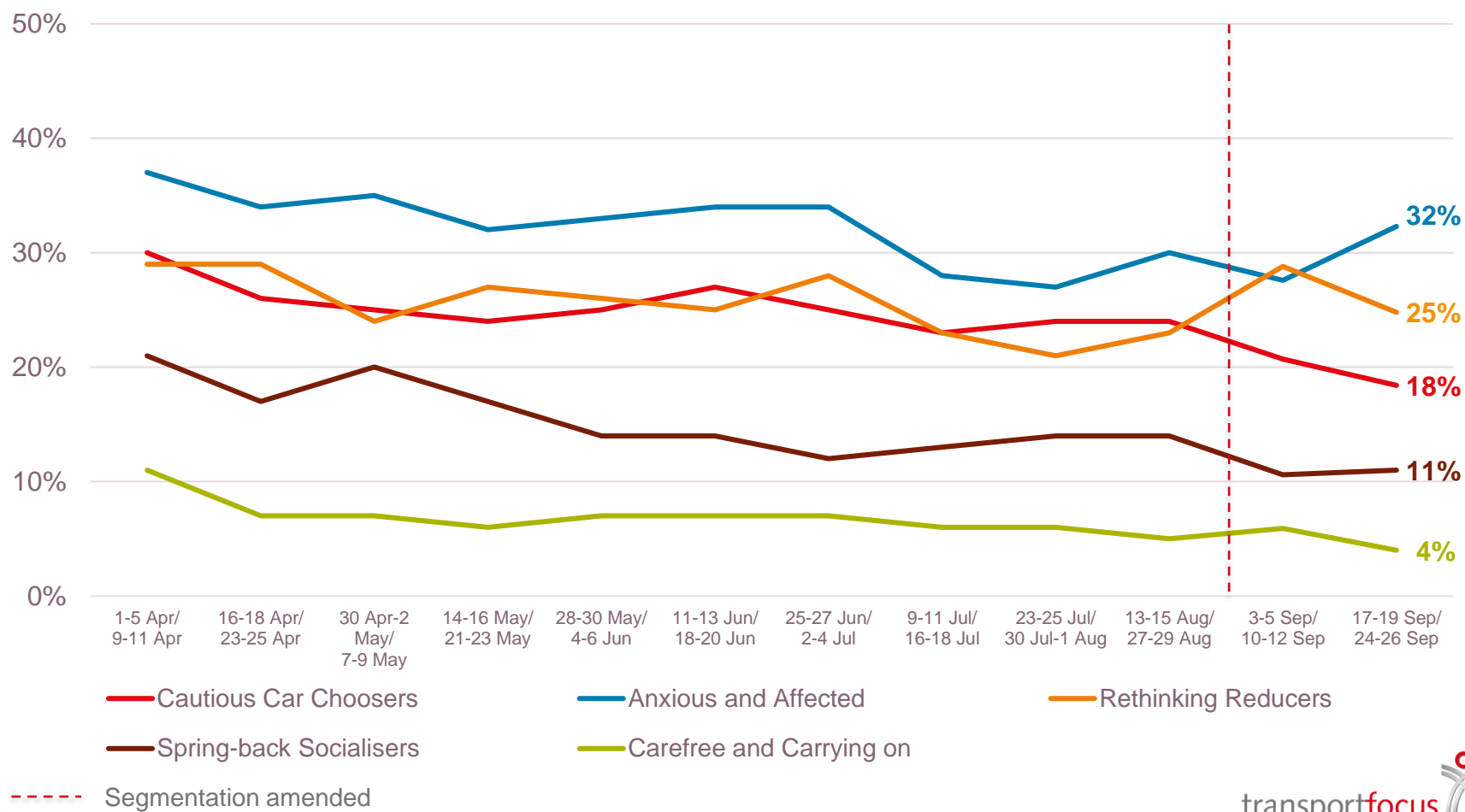
## The Carefree and Carrying on segment are more likely than others to be making journeys for leisure reasons

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



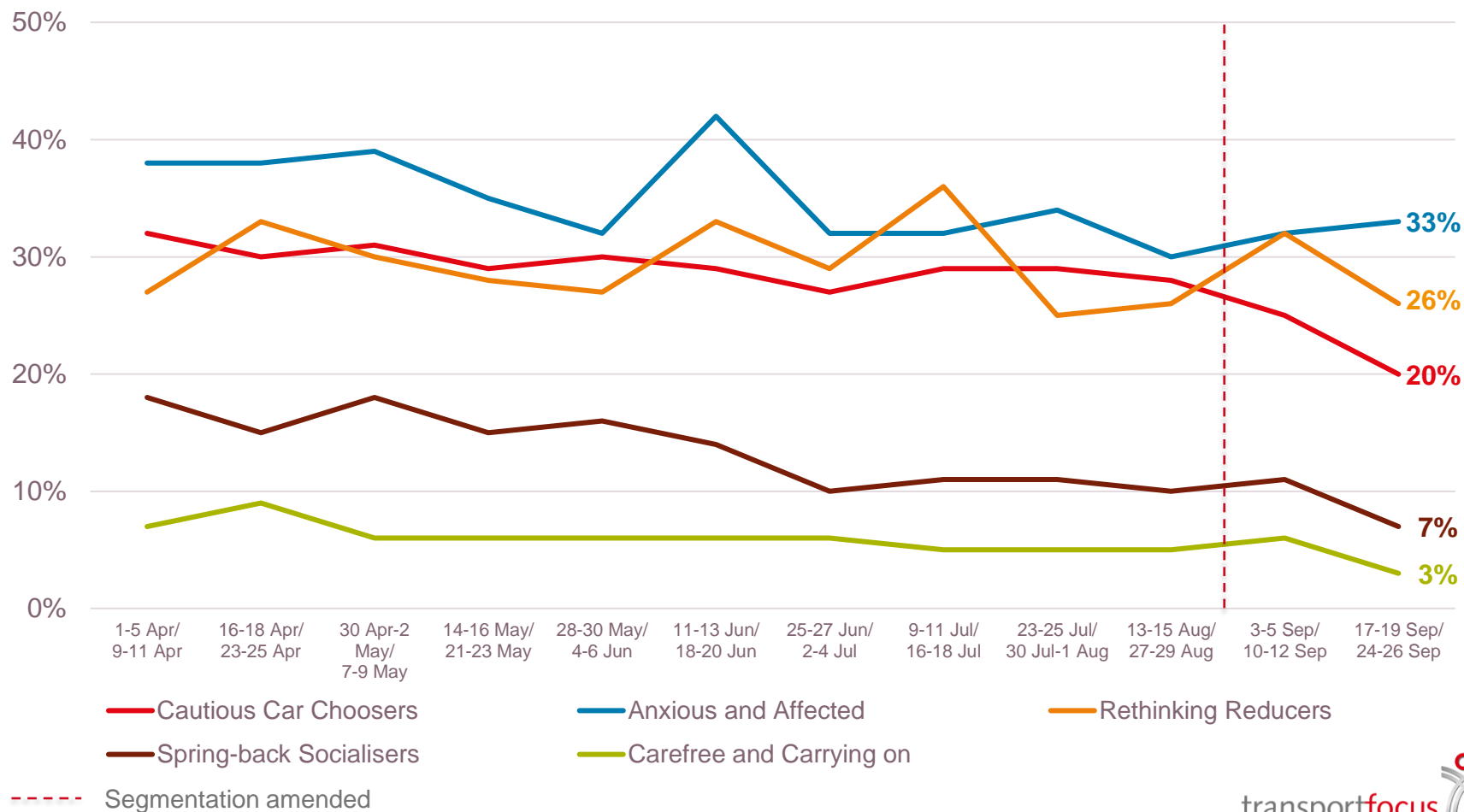
## Those who are Anxious and Affected are more likely than others to be avoiding using public transport

Proportions avoiding using public transport



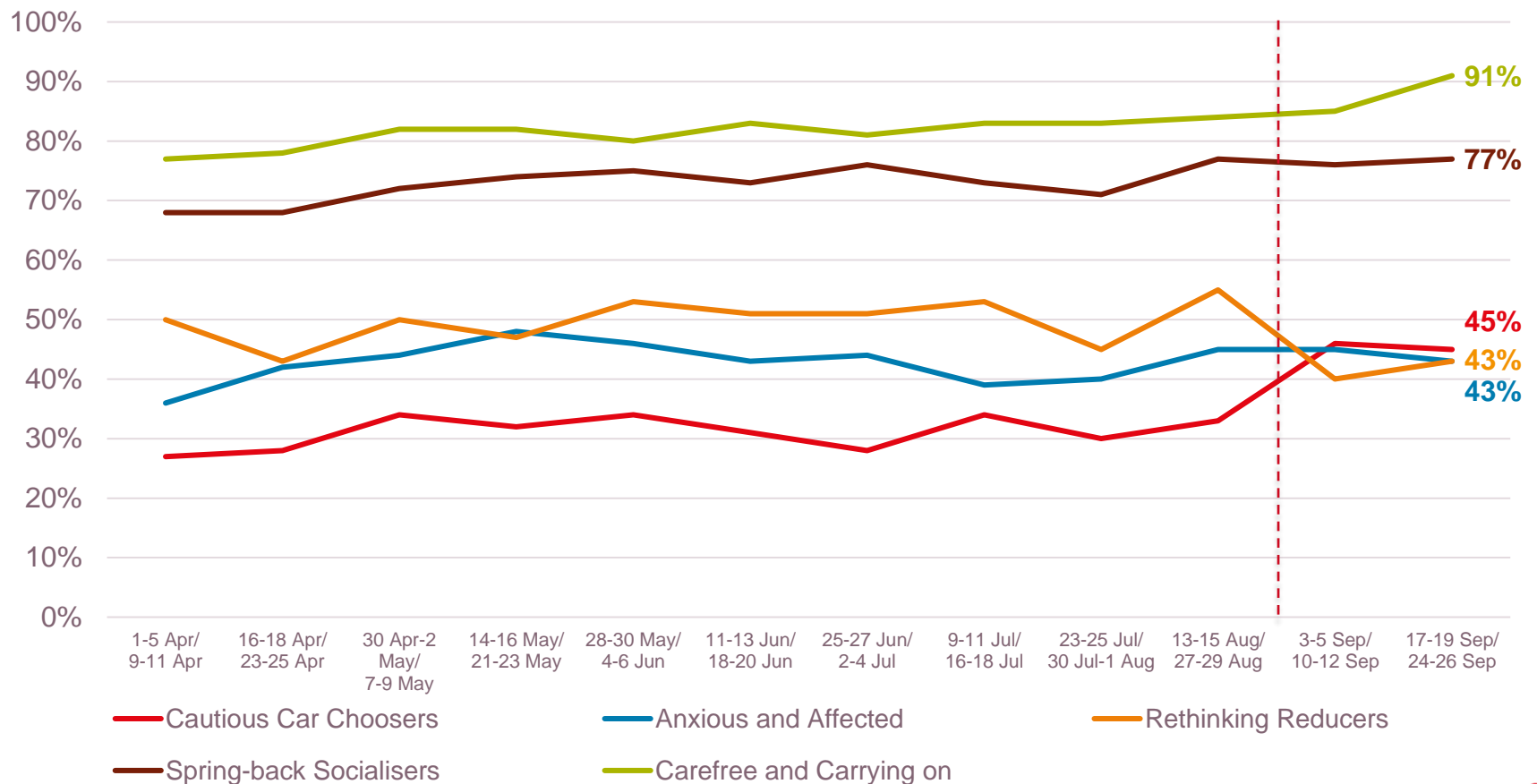
## Those who are Anxious and Affected are more likely than others to say that they are not using public transport because they don't feel safe to do so

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 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**

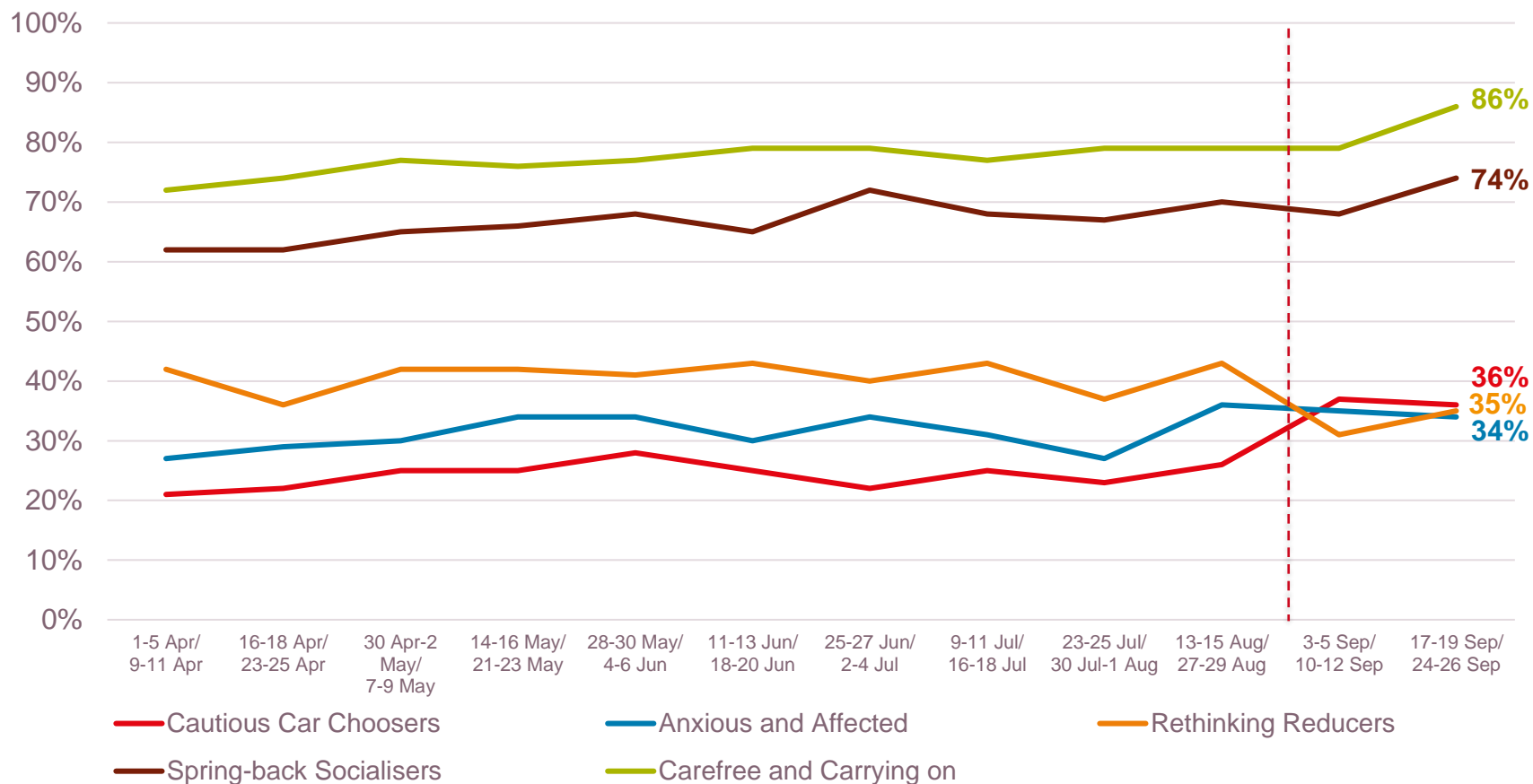
How safe would you feel making a journey by train? (% 'safe')



--- Segmentation amended

## 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

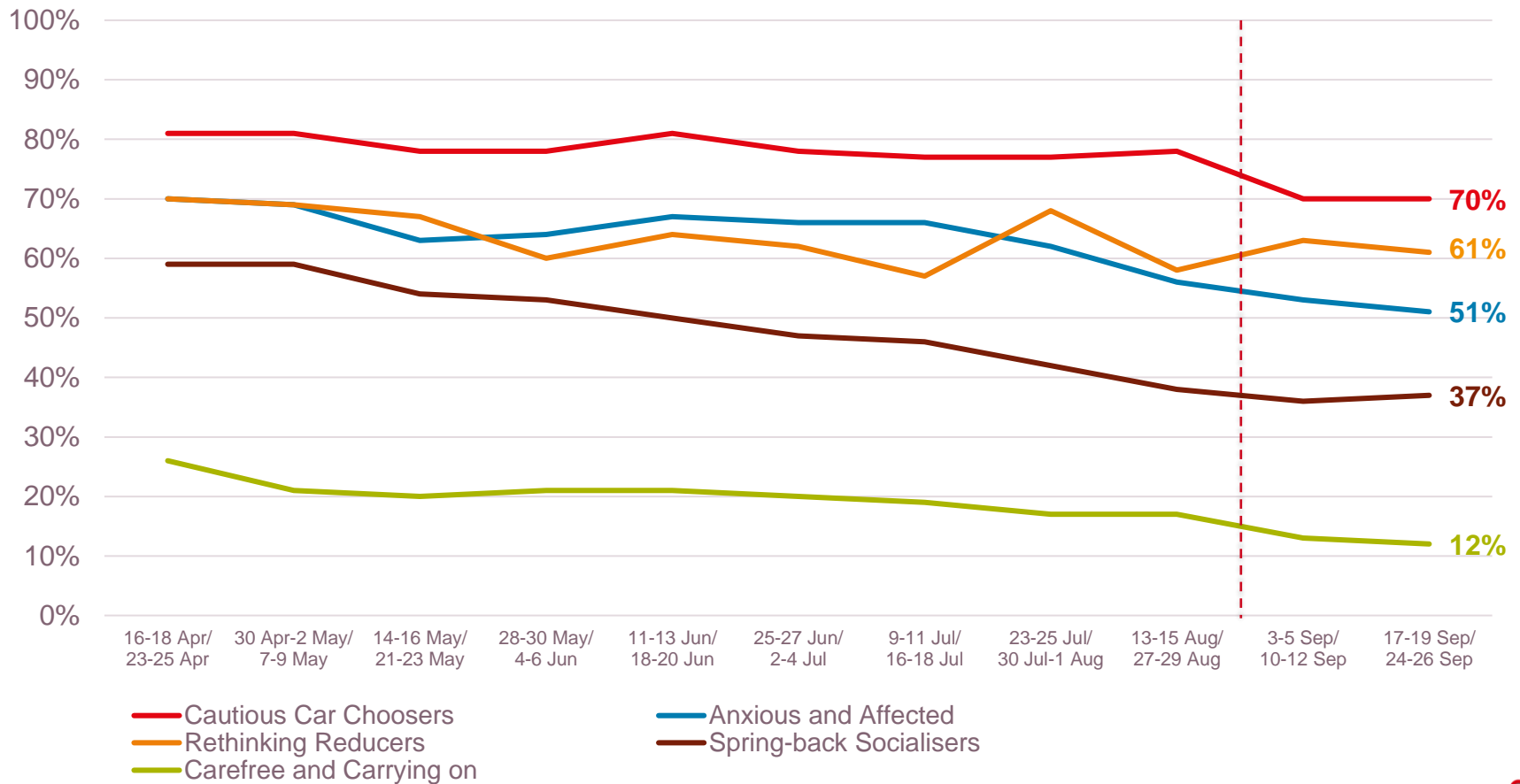
How safe would you feel making a journey by bus? (% 'safe')



--- Segmentation amended

**In general across each of the 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')**

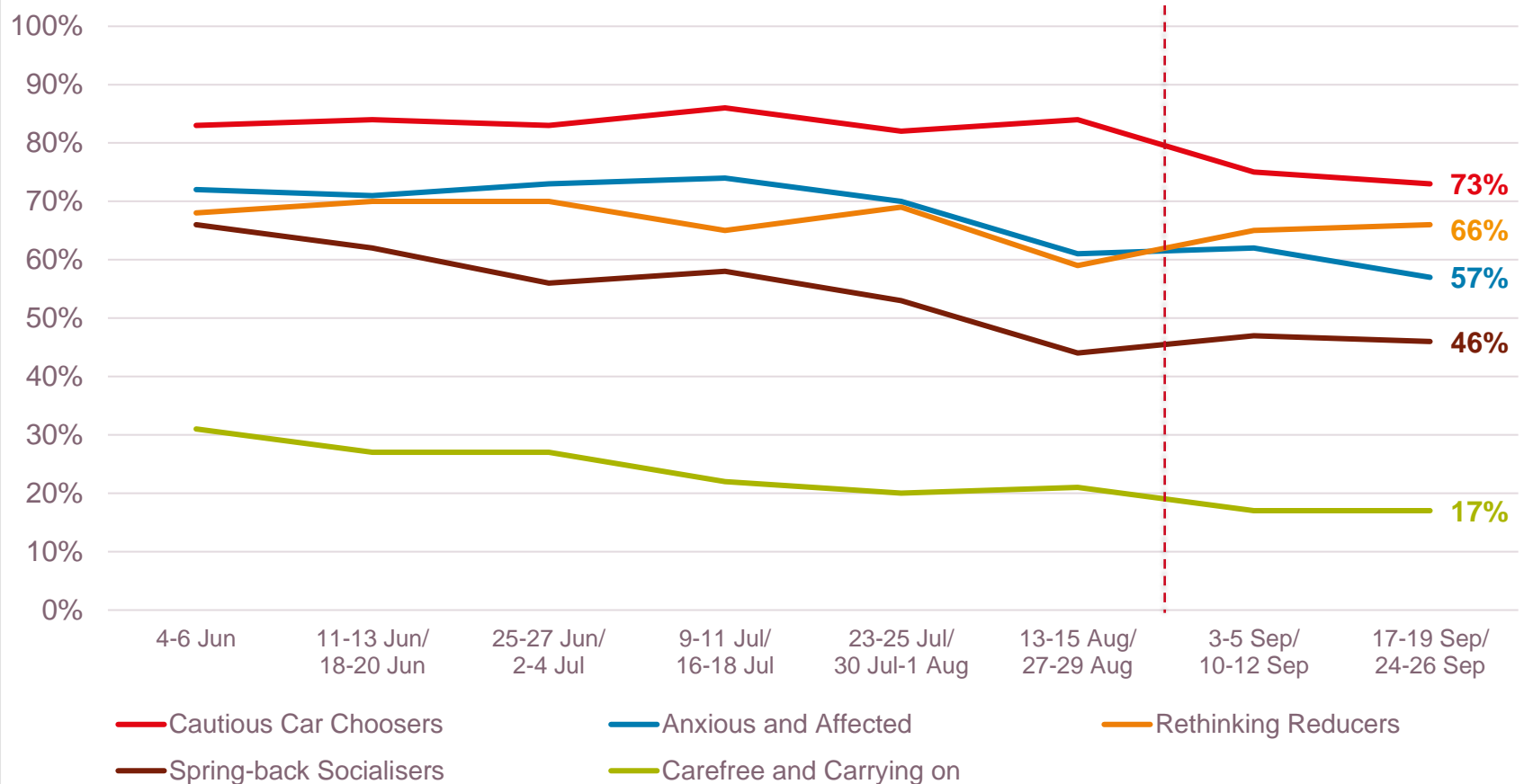


--- Segmentation amended



**In general across each of the 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**

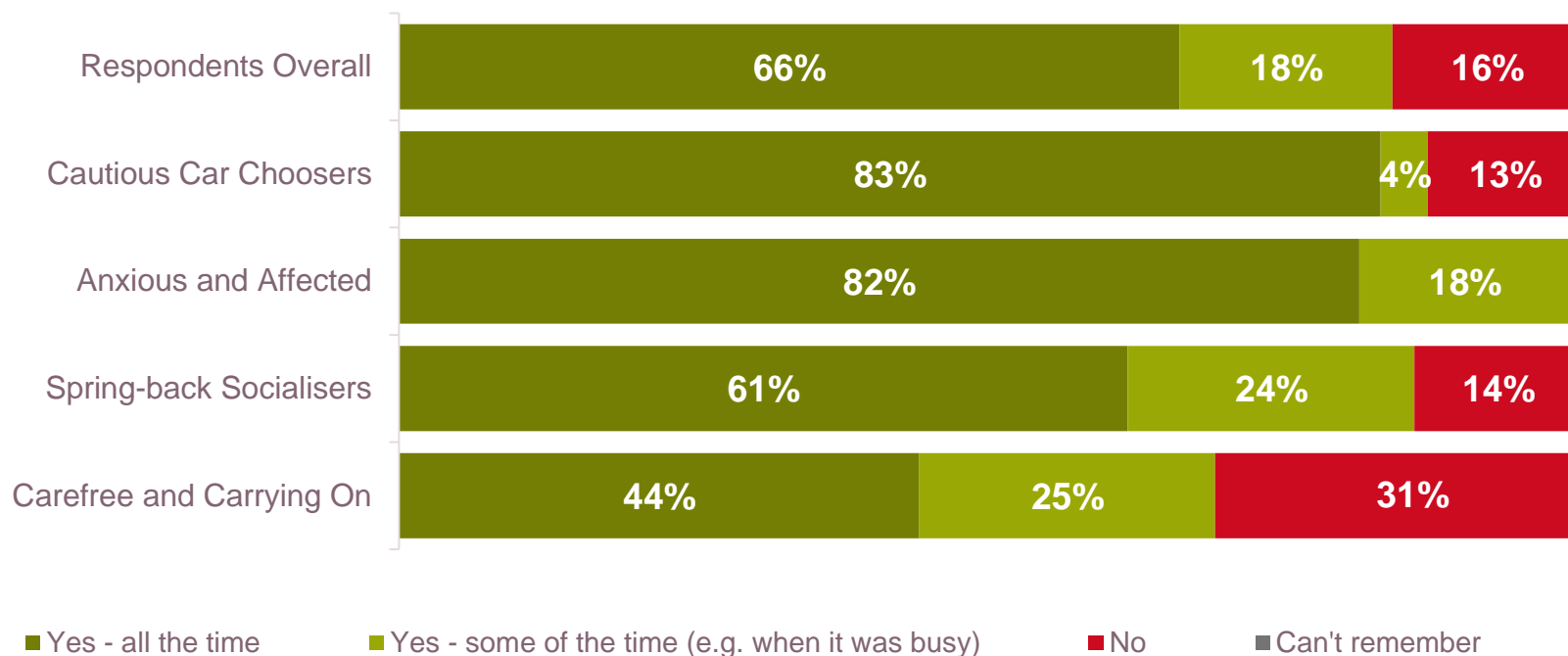
**'I won't use public transport unless passengers are required to wear face coverings' (% 'agree')**



--- Segmentation amended

## 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?

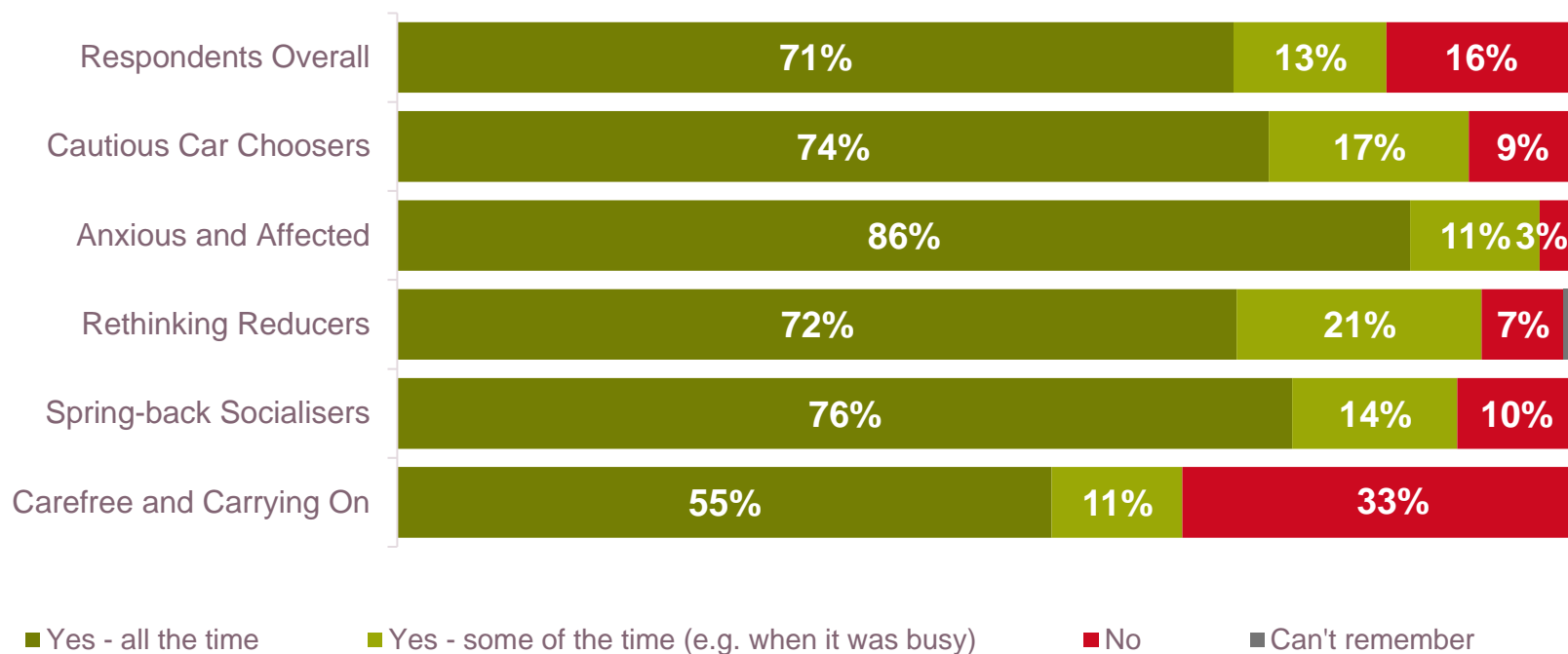


Base: Those making a journey by train. Omnibus w62-w63 aggregated (405). Cautious Car Choosers (55), Anxious and Affected (100), Spring-back Socialisers (70), Carefree and Carrying On (138).

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

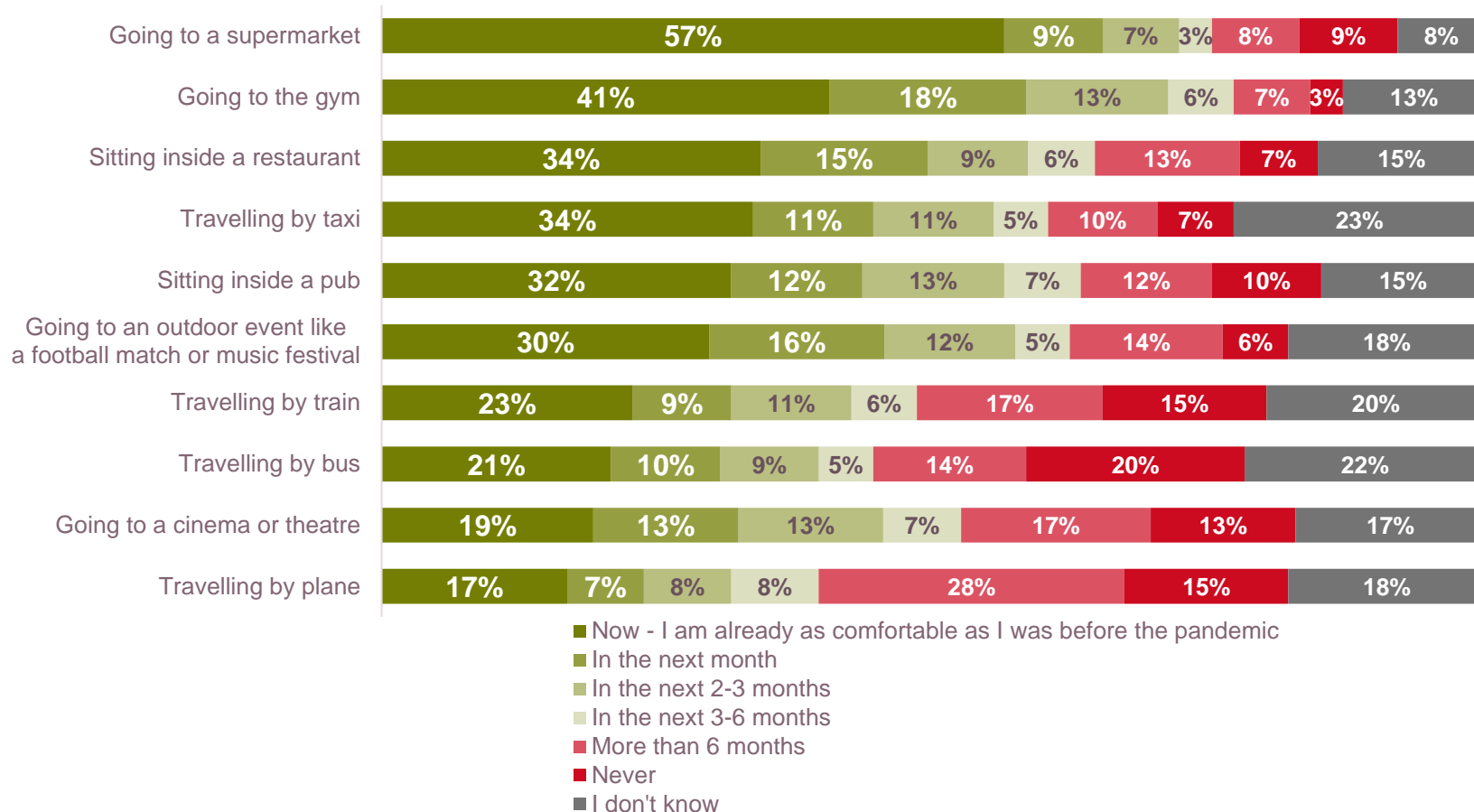
On your most recent bus journey did you wear a face covering?



Base: Those making a journey by bus outside London. Omnibus w62-w63 aggregated (743). Cautious Car Choosers (67), Anxious and Affected (183), Rethinking Reducers (74), Spring-back Socialisers (154), Carefree and Carrying On (260).

# Around one in five Cautious Car Choosers say that they feel as comfortable using a train or a bus now as they did before the pandemic

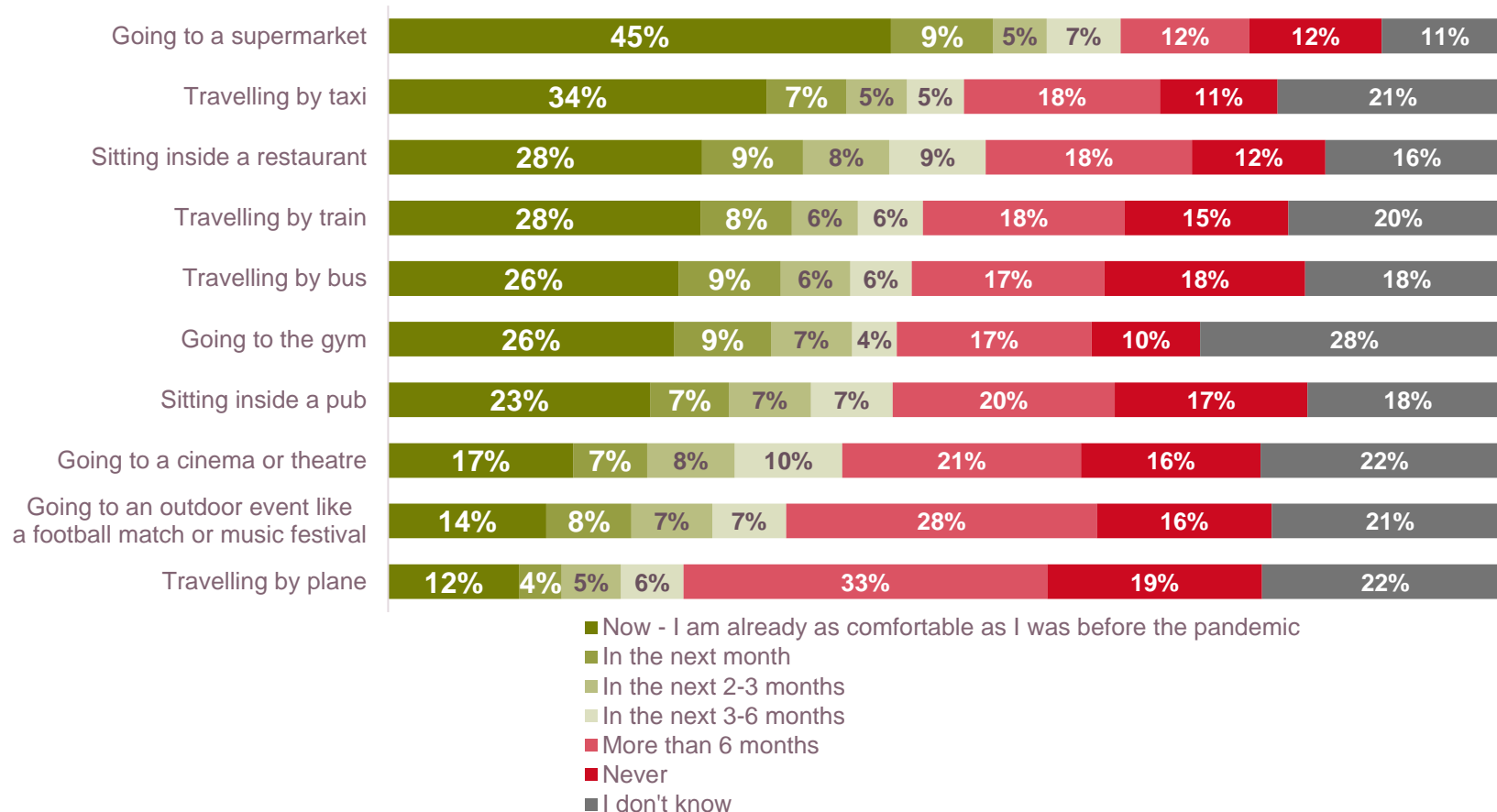
When do you think you will feel as comfortable doing each of the following activities as you felt before the Covid-19 pandemic?



Base: w62 and w63 aggregated. Cautious Car Choosers. Base sizes range from 312 (gym) to 760 (supermarket) as excludes 'not applicable'

# More than a quarter of those who are Anxious and Affected say that they feel as comfortable using a train or a bus now as they did before the pandemic

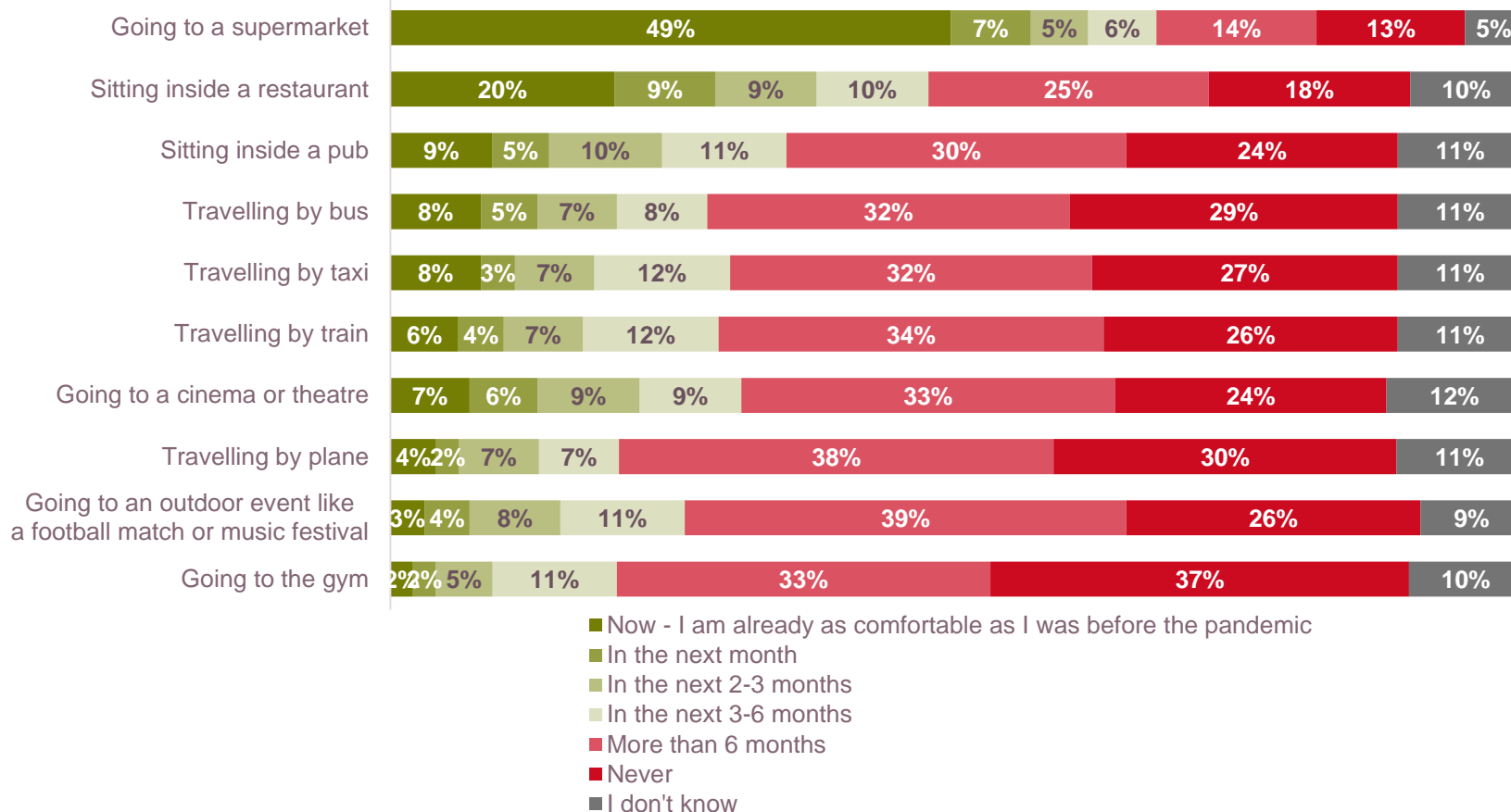
When do you think you will feel as comfortable doing each of the following activities as you felt before the Covid-19 pandemic?



Base: w62 and w63 aggregated. Anxious and Affected. Base sizes range from 214 (gym) to 574 (supermarket) as excludes 'not applicable'

# Around one in ten Rethinking Reducers say that they feel as comfortable using a train or a bus now as they did before the pandemic

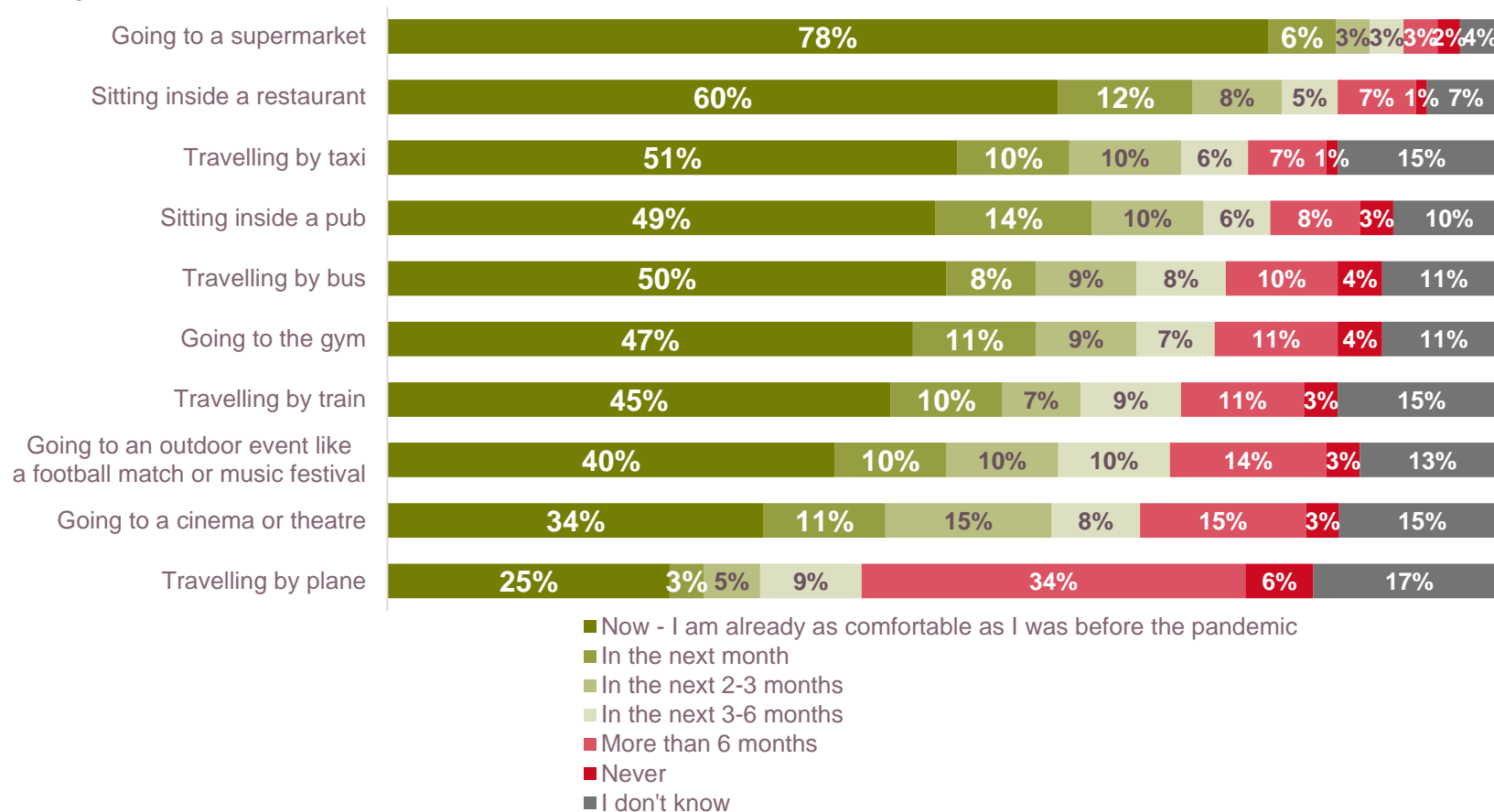
When do you think you will feel as comfortable doing each of the following activities as you felt before the Covid-19 pandemic?



Base: w62 and w63 aggregated. Rethinking Reducers. Base sizes range from 386 (gym) to 628 (supermarket) as excludes 'not applicable'

# Around a half of Spring Back Socialisers say that they feel as comfortable using a train or a bus now as they did before the pandemic

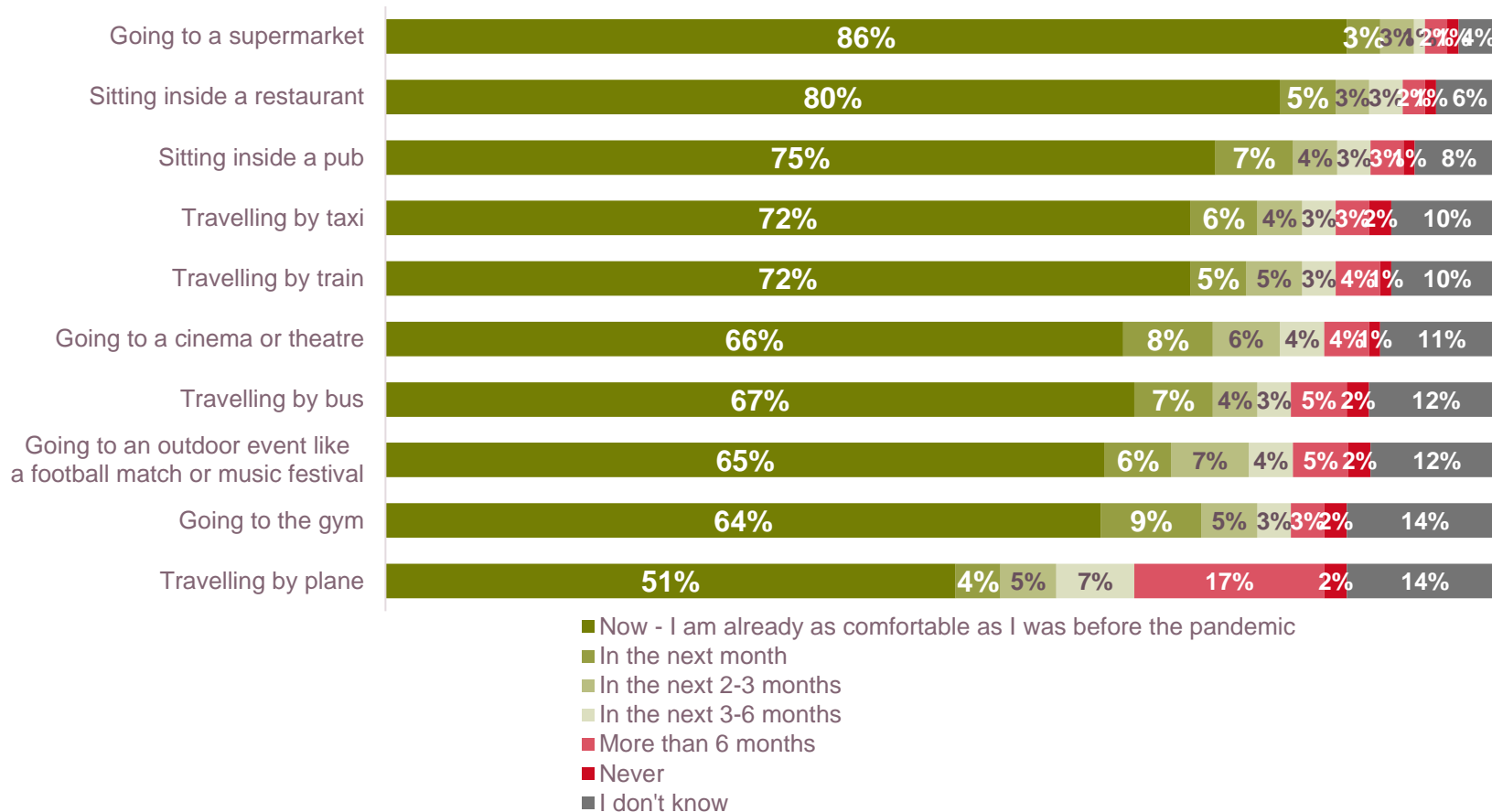
When do you think you will feel as comfortable doing each of the following activities as you felt before the Covid-19 pandemic?



Base: w62 and w63 aggregated. Spring Back Socialisers. Base sizes range from 247 (gym) to 732 (supermarket) as excludes 'not applicable'

## Two-thirds or more of those who are Carefree and Carrying On say that they feel as comfortable using a train or a bus now 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: w62 and w63 aggregated. Carefree and Carrying On. Base sizes range from 602 (gym) to 1,205 (supermarket) as excludes 'not applicable'



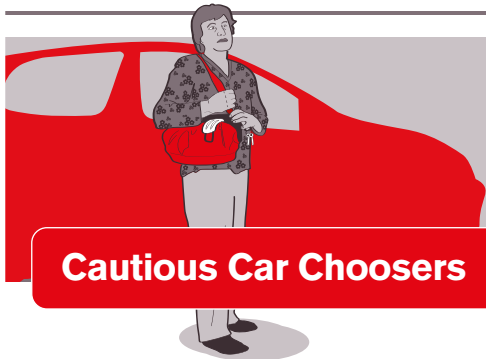
# Meet our segments



**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.

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## 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 62/63

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 62 / 63	4,053	770	576	629	734	1209	135

# Questions that define the segments

The questions which are used to differentiate the segments from week 60 onwards are:

1) To what extent do you agree or disagree that...?

- The coronavirus is a major concern for me
- Enough is being done to ensure coronavirus safety on public transport
- I will never again feel completely comfortable on public transport
- I have been avoiding unnecessary activities due to the coronavirus
- I am concerned about my financial situation currently or in the near future
- Public transport is not for people like me
- I am reliant upon public transport
- I feel comfortable doing the activities that I did before the pandemic
- I have returned to doing the activities that I did before the pandemic.

2) Thinking of each of the following activities, when do you think you will feel as comfortable doing each of them as you felt before the Covid-19 pandemic?

Travelling by bus / Travelling by train / Travelling by aeroplane / Travelling by taxi / Sitting inside a pub / Sitting inside a restaurant / Going to the cinema or theatre / Going to an outdoor event like a football match or music festival / Going to the supermarket / Going to the gym.



## 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.**