

# Covid-19 travel segmentation

5 - 28 November analysis  
December 2021



# Turbulent times ahead?

This report shows how our five segments (see page 32) have been feeling about public transport in November. It's important to note the month – and the fieldwork – was just drawing to a close when news of the new Omicron variant filtered through. New measures were subsequently announced by the UK Government, including mandatory wearing of face coverings on public transport in England. This timing means it's too soon to say whether uncertainty about the new variant would cause our segments to substantially change their views.

The Carefree and Carrying On segment remains the biggest, continuing to slowly grow in size and now representing almost one in three in the population. This segment increasingly stands apart from the rest. Among those that hadn't used public transport in the last week they are the only segment where more say they would feel safe travelling by bus or train. The other four segments have all seen slight decreases over the last month.

Similarly, overall satisfaction with the journey by train has declined across all the segments except for the Carefree and Carrying On. In contrast, their satisfaction with their last journey increased to more than nine in 10. When it comes to journey satisfaction the differences between most of the segments are less stark. The Anxious and Affected remain the exception, with only three in four satisfied with their last train journey, more than 10 per cent below the next segment. This pattern is repeated for the detailed journey measures. Just one in three of the Anxious and Affected are satisfied with information on how busy the train would be, and – ahead of the change in the law in England - just one in four with the number of people wearing face coverings.

(Continues on page 2)

# Turbulent times ahead?

On bus the overall pattern is the same – with the Anxious and Affected least satisfied. Encouragingly the direction of travel is different, with those in this segment more satisfied than previously. We have often focussed on this segment, which represents less than one in five in the population, but for good reason. They have been consistently the most likely to have used public transport, with more than four in 10 using in the last seven days, much more than even the most Covid-relaxed segments.

This is our fifteenth and last segmentation report – at least for now. The segmentation has proven to be a useful tool to demonstrate how views about Covid and public transport differ within the population and how this affects responses to changes in the progress of the pandemic, restrictions and satisfaction with their journey. We've used this insight to help transport operators and authorities to better target their interventions and communications. As has become clear again recently, the pandemic is not yet over. The dividing lines between segments will endure for some time to come.

# About this report

The majority of the data presented in this report aggregates two survey waves of the Transport Focus *Travel during Covid-19* 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
1-3 October / 8-10 October	W64 + W65
15-17 October / 29-31 October	W66 + W67
12-14 November / 26-28 November	W68 + W69

# 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?

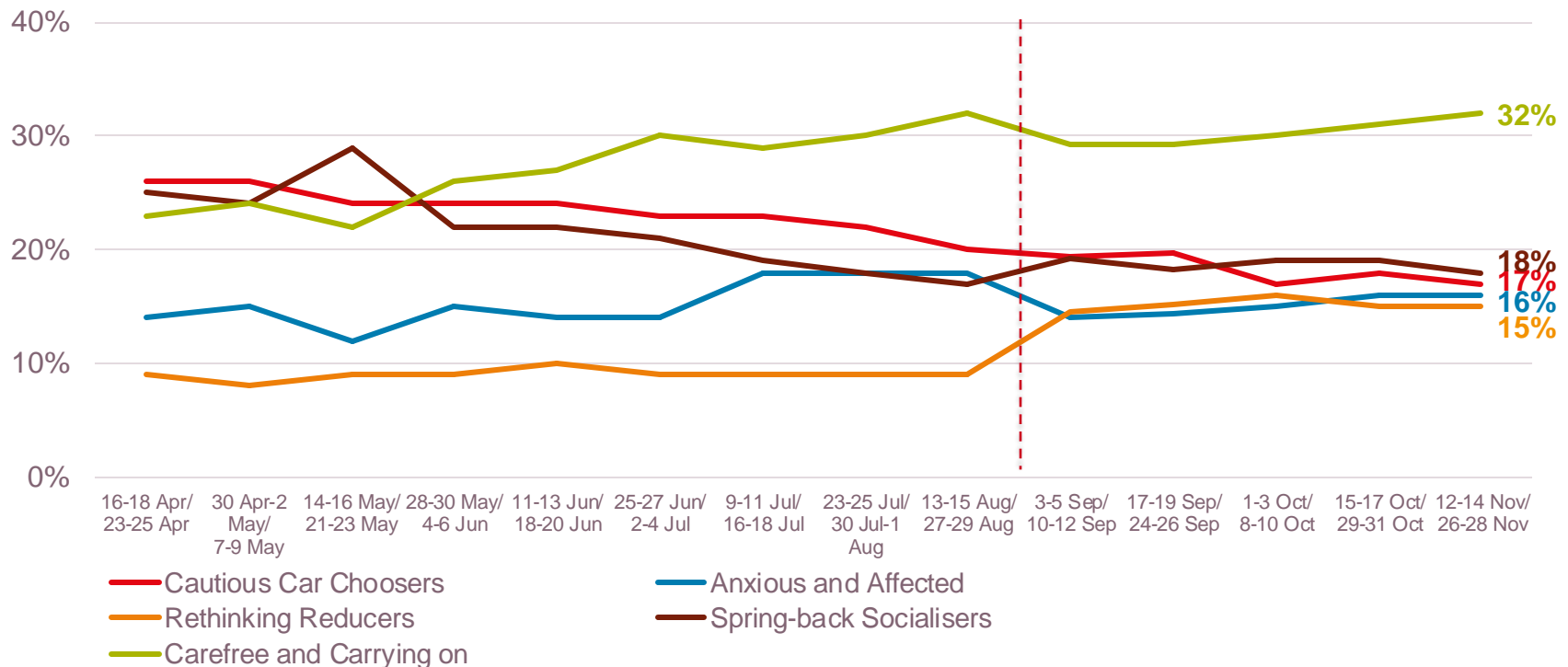
The effect of these changes is that the segmentation is now based to a greater degree on how people feel about doing the things that they did before the pandemic, rather when they will be going back to doing these things.

On the charts that follow, the point at which the segmentation changes in this way is indicated by a red hashed line.

# 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\*

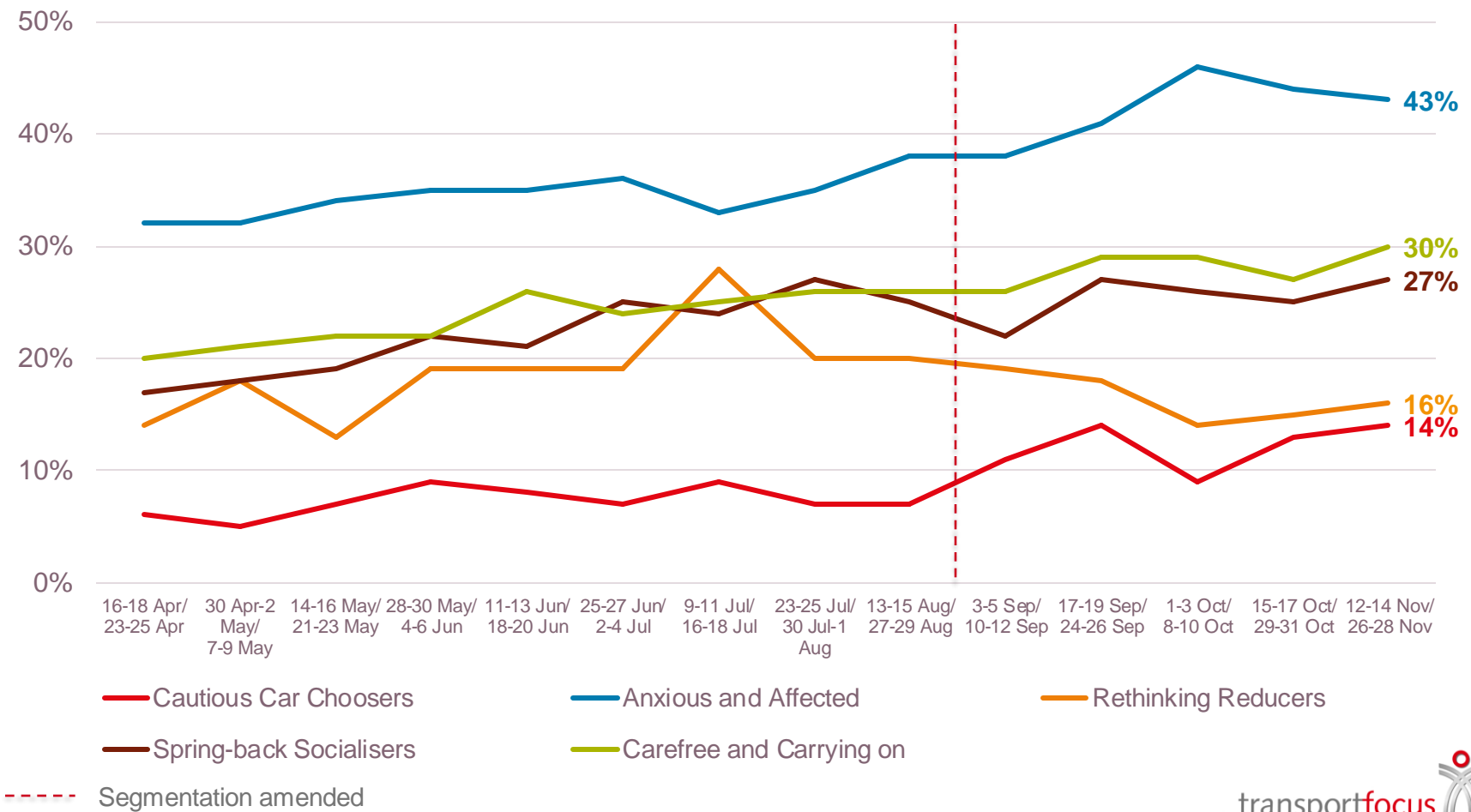


\*The size of the segments does not sum to 100% as a proportion of the sample remains unclassified in this way

--- Segmentation amended

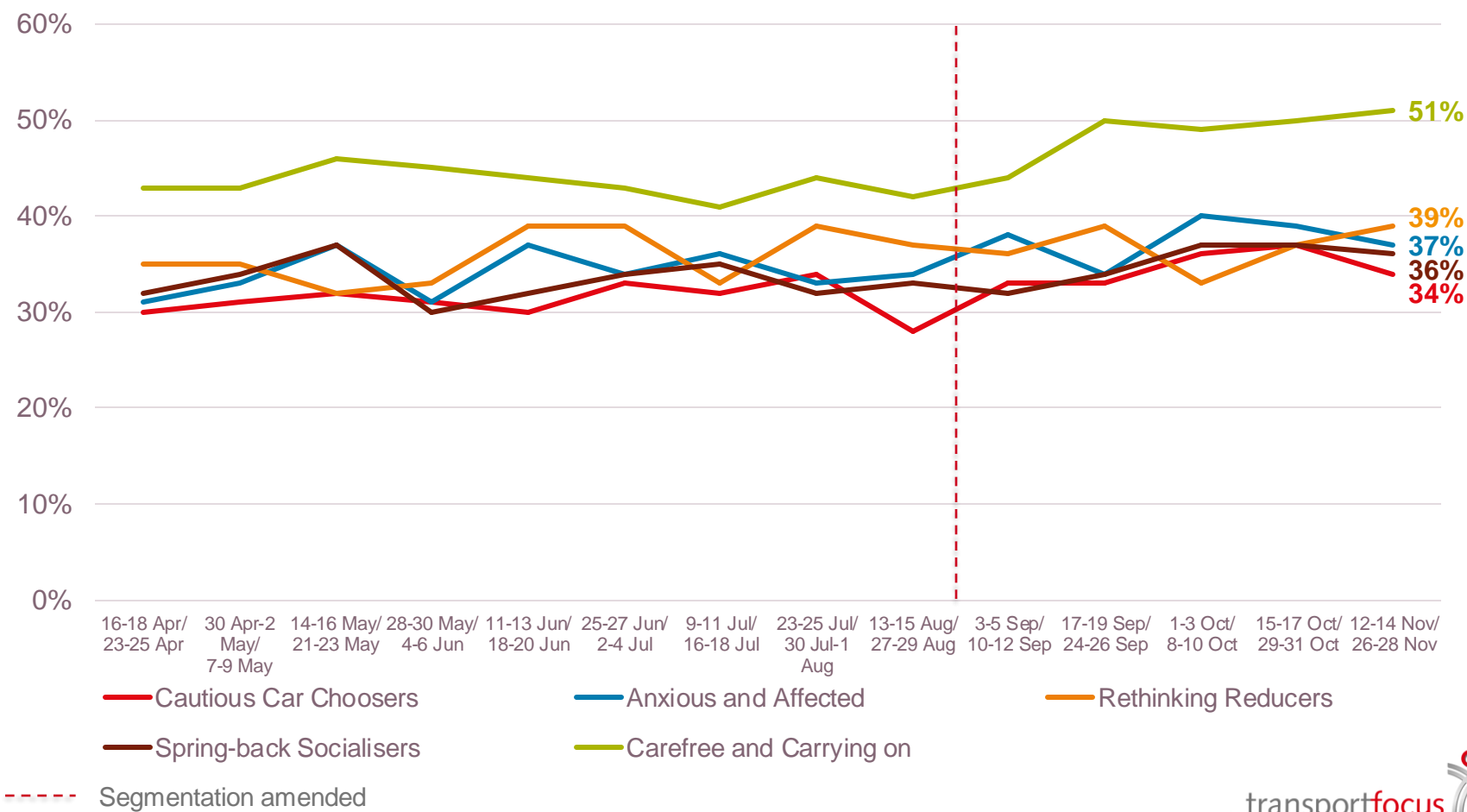
**The Anxious and Affected segment were increasingly more likely than others to have used public transport in the last seven days, though their use of public transport has decreased recently**

## 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

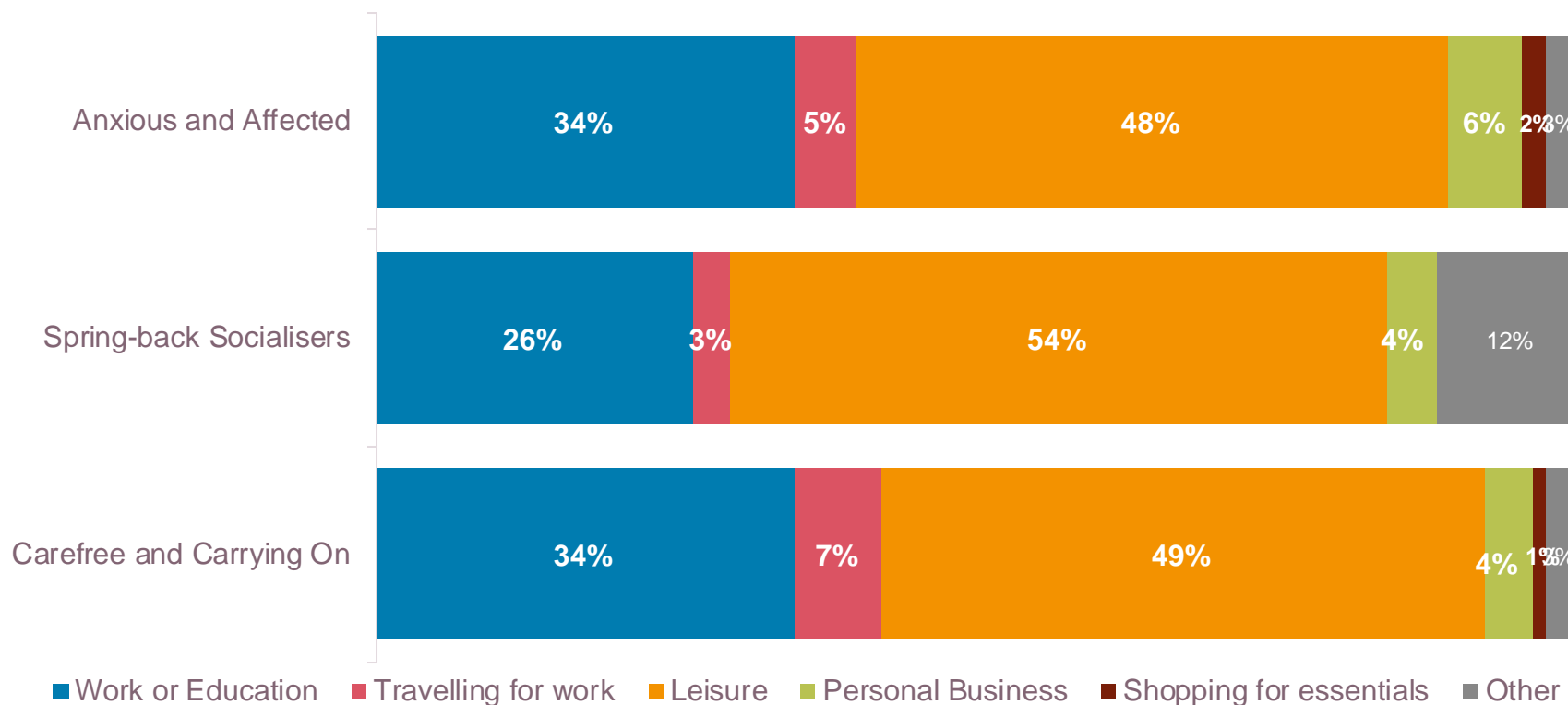
### Journeys made to or from work (by any mode of transport)





**Those who are Anxious and Affected, and those who are Carefree and Carrying On who used a train are more likely than other segments to have done so to travel to work**

What was the main purpose of your most recent journey by train?

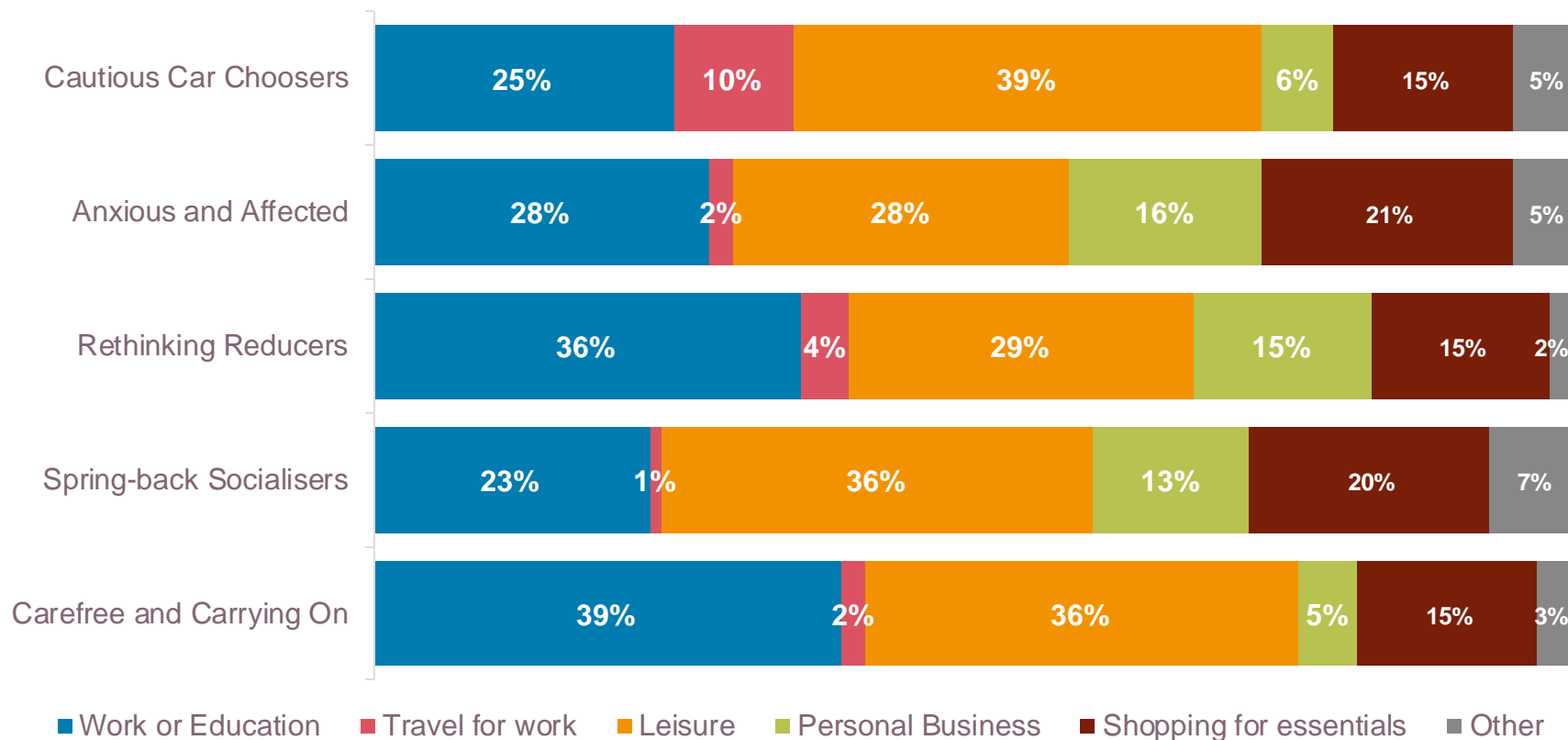


Base: Those making a journey by train. Omnibus w68-w69 aggregated. Anxious and Affected (98), Spring-back Socialisers (65), Carefree and Carrying On (163).

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

**Those who are Carefree and Carrying On who have used a bus are more likely than other segments to have done so to travel to work. Cautious Car Choosers are more likely to have used a bus to make journeys for leisure reasons**

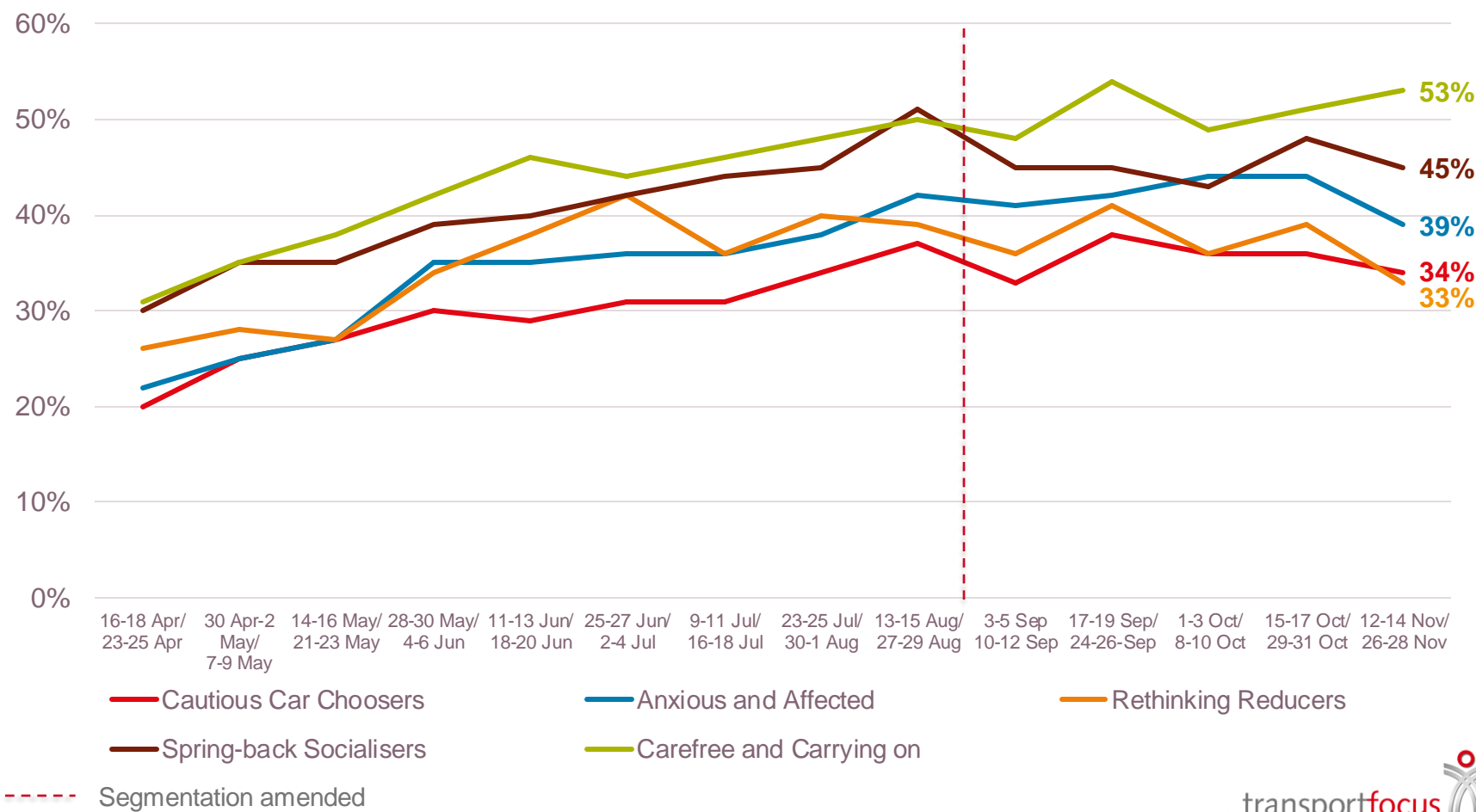
### What was the main purpose of your last journey by bus?



Base: Those making a journey by bus. Omnibus w68-w69 aggregated. Cautious Car Choosers (52), Anxious and Affected (203), Rethinking Reducers (66), Spring-back Socialisers (138), Carefree and Carrying On (262).

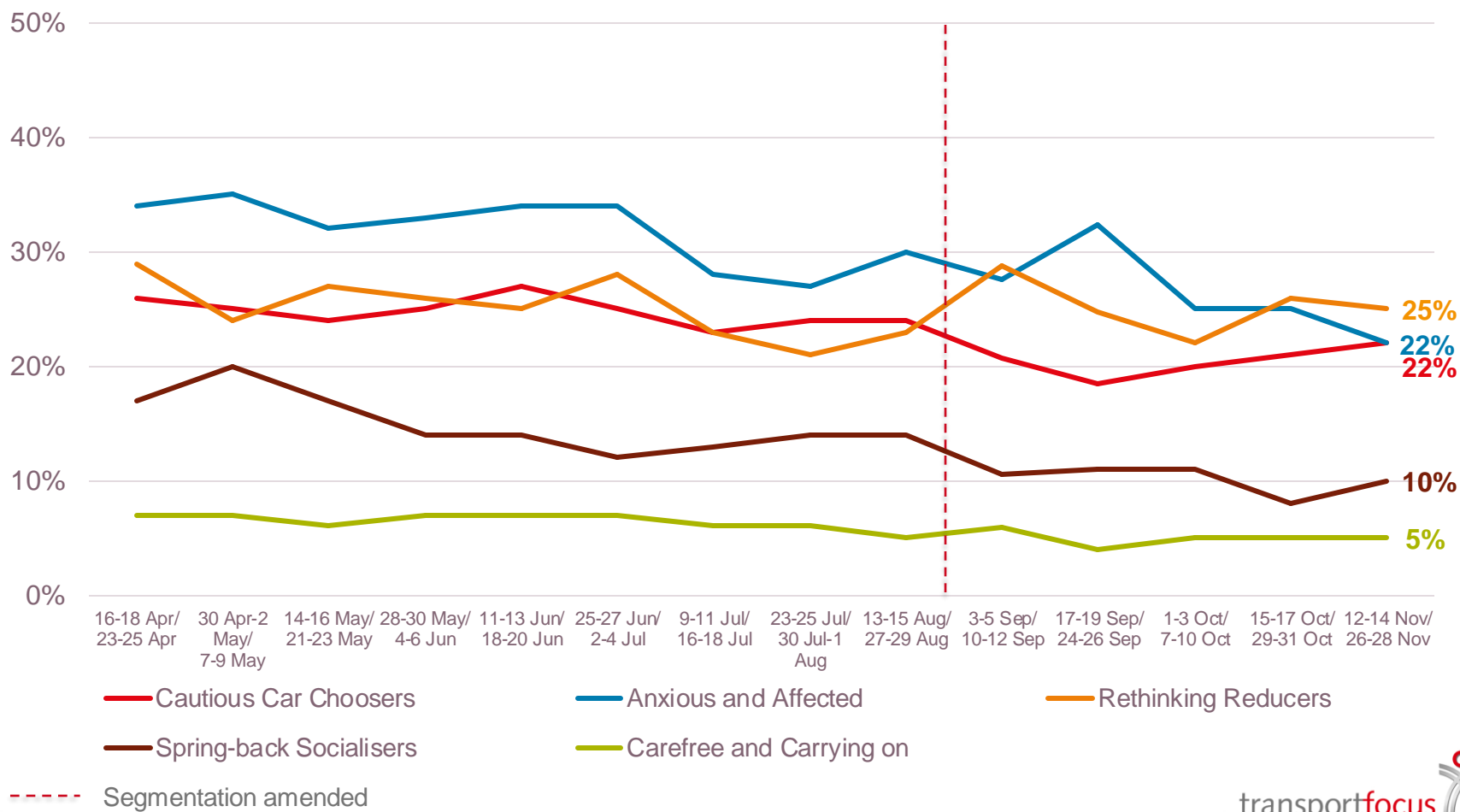
## The Carefree and Carrying on segment are increasingly more likely than others to be making journeys for leisure reasons

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



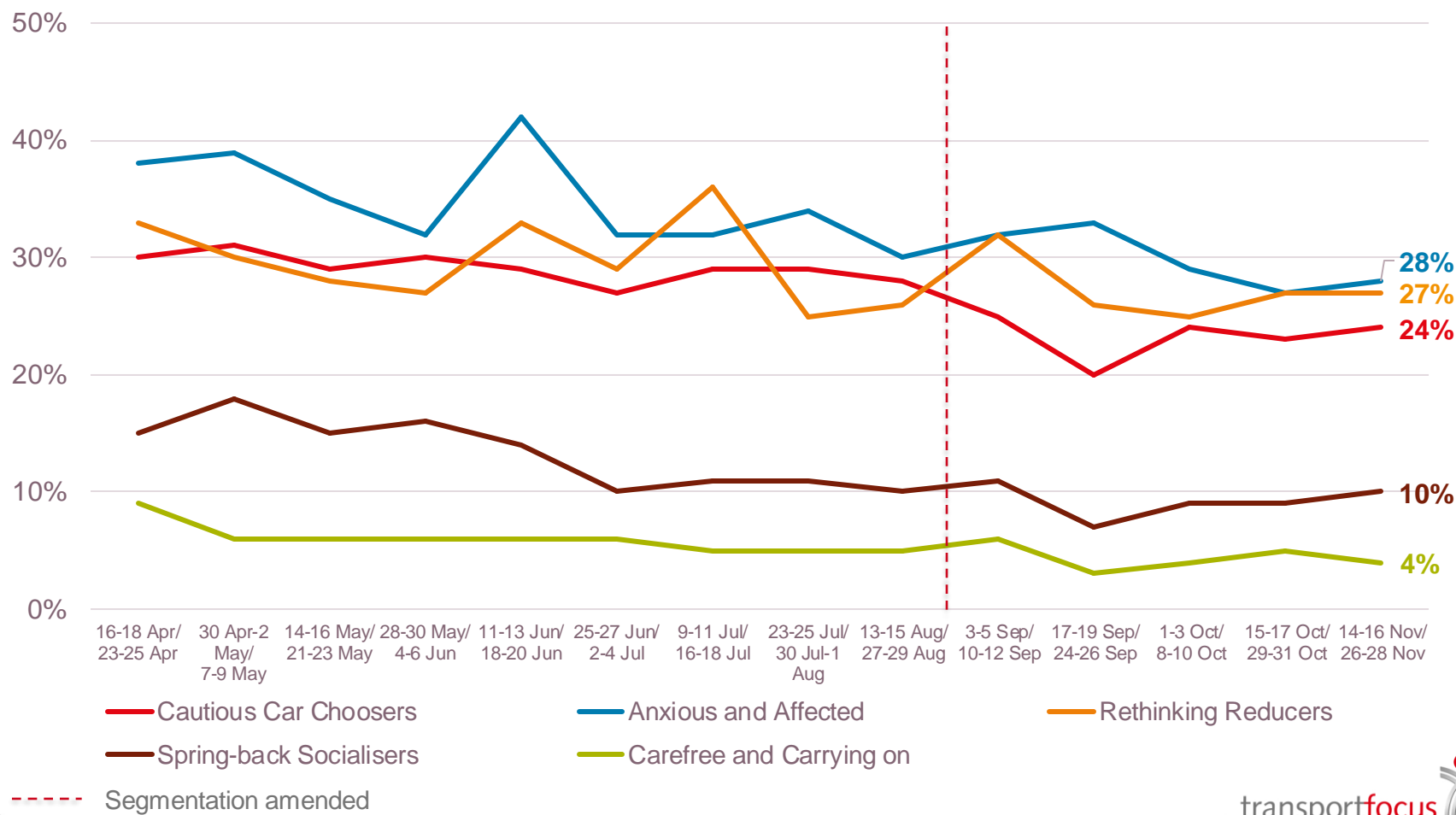
# Rethinking Reducers, those who are Anxious and Affected, and Cautious Car Choosers are more likely than others to be avoiding using public transport

## Proportions avoiding using public transport



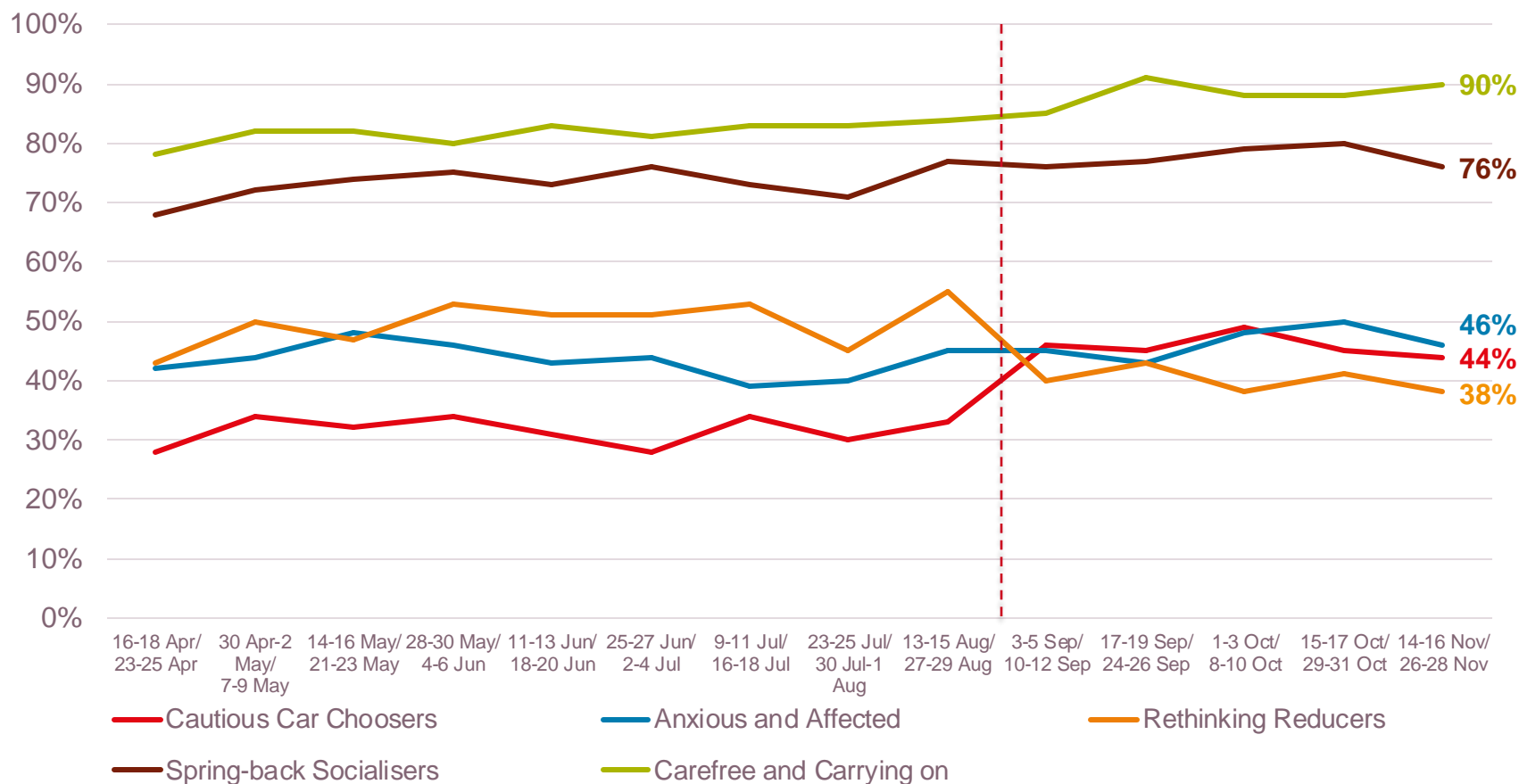
## Rethinking Reducers and those who are Anxious and Affected are more likely than others to say that they are not using public transport because they don't feel safe doing so at the moment

Proportions not using public transport because they don't feel safe doing 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**

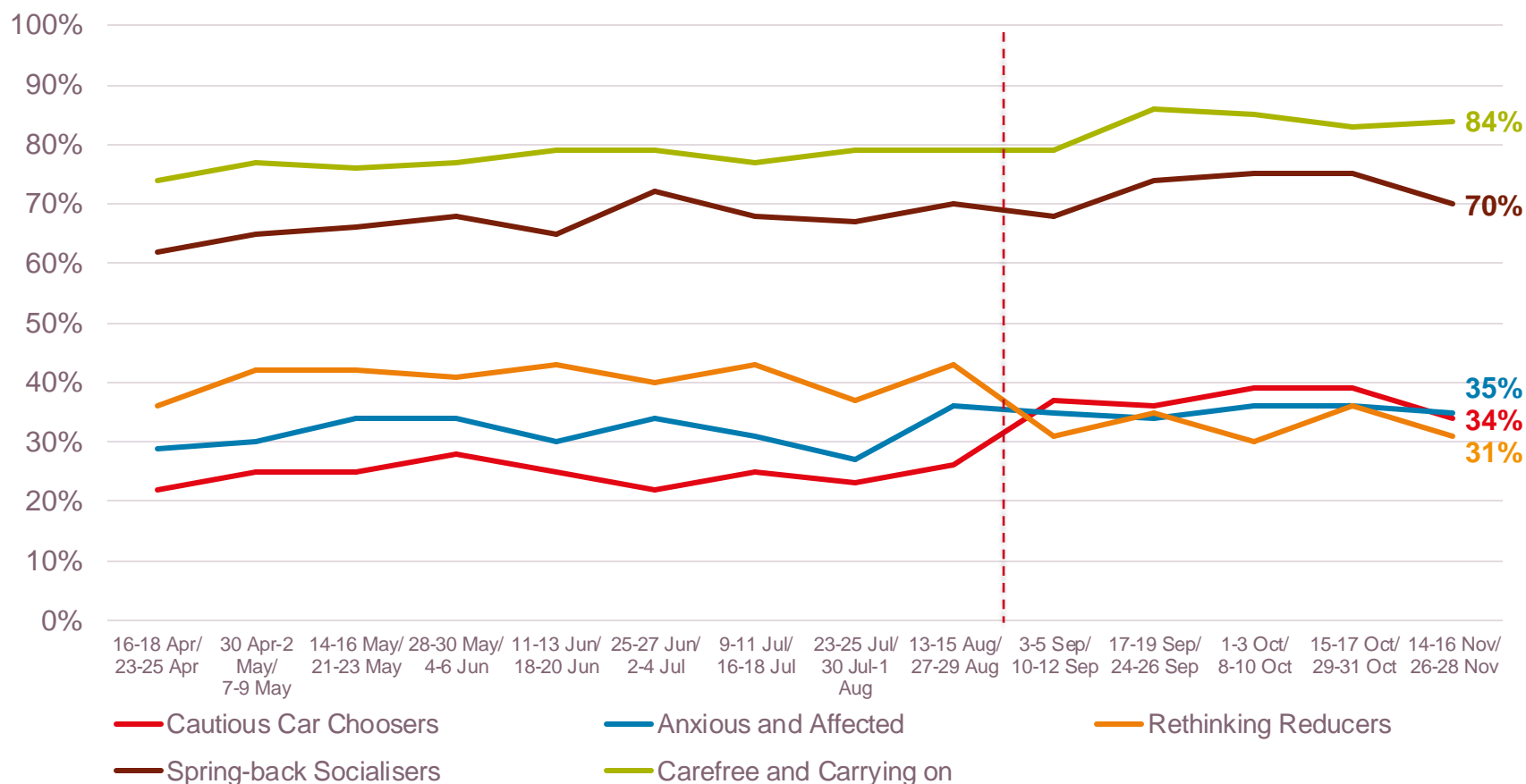
How safe would you feel making a journey by train? (% 'safe')



--- 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

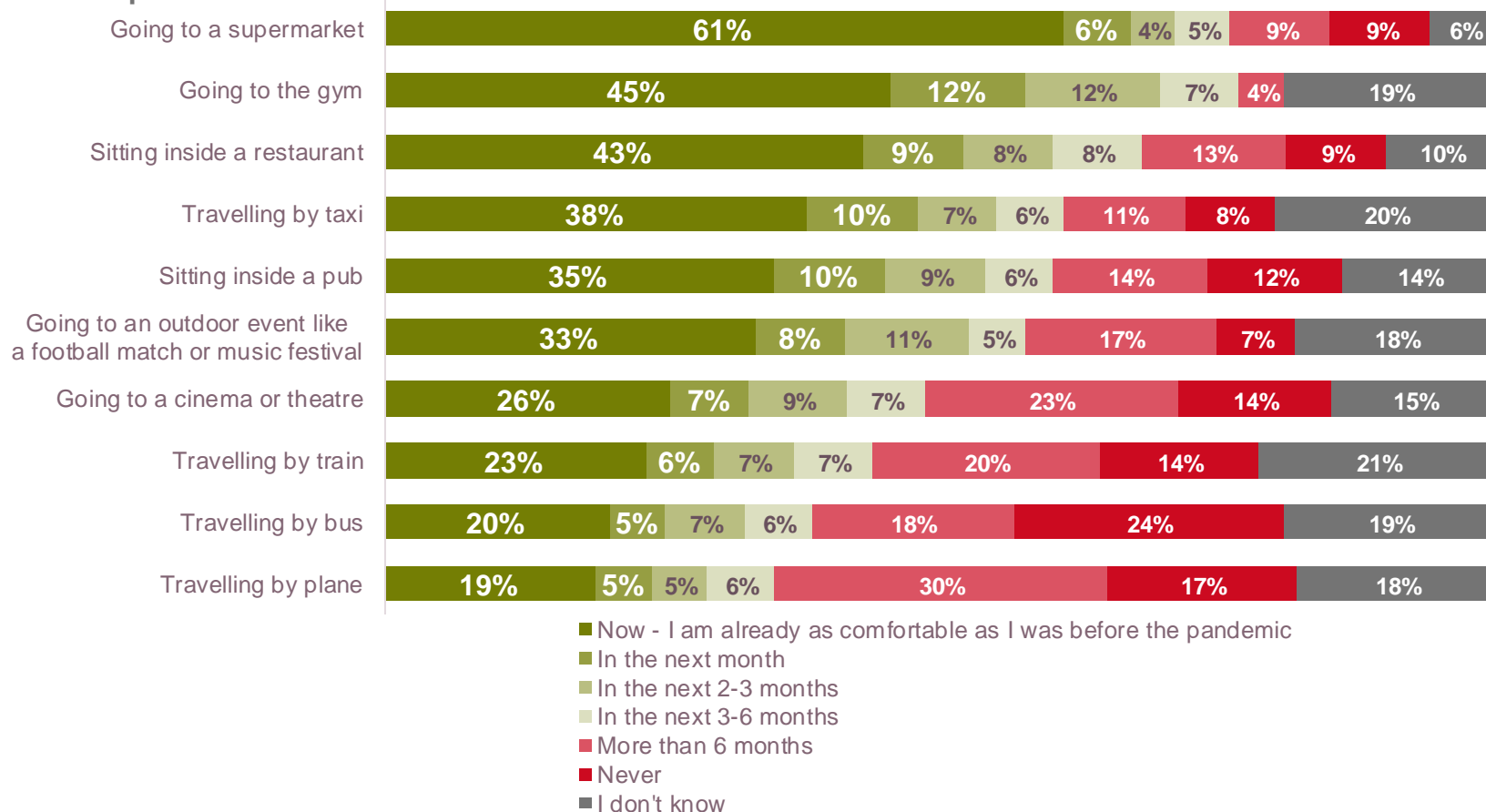
How safe would you feel making a journey by bus? (% 'safe')



--- Segmentation amended

# 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?

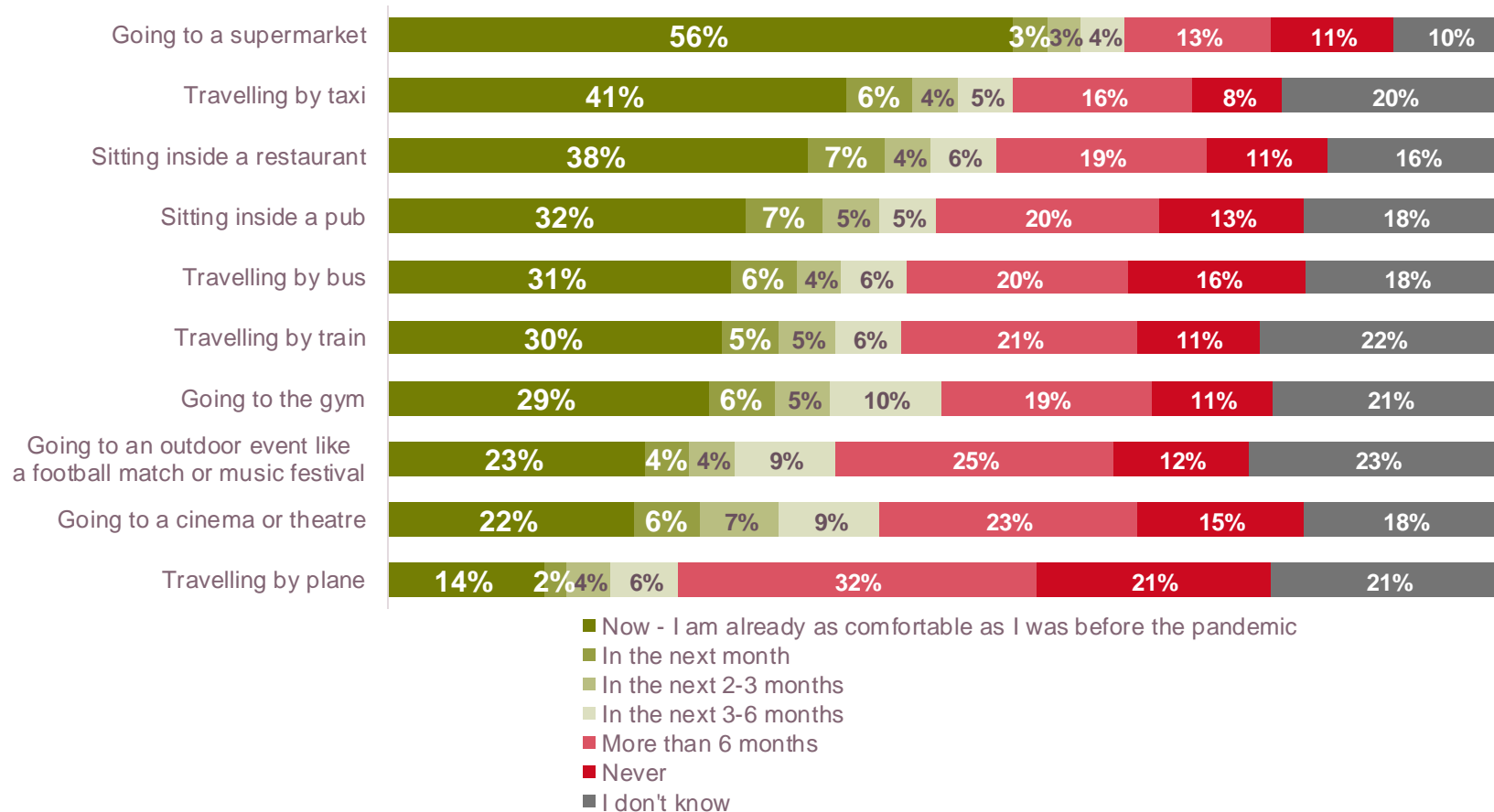


Base: w68 and w69 aggregated. Cautious Car Choosers. Base sizes range from 241 (gym) to 631 (supermarket) as excludes 'not applicable'



# Around three in ten 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

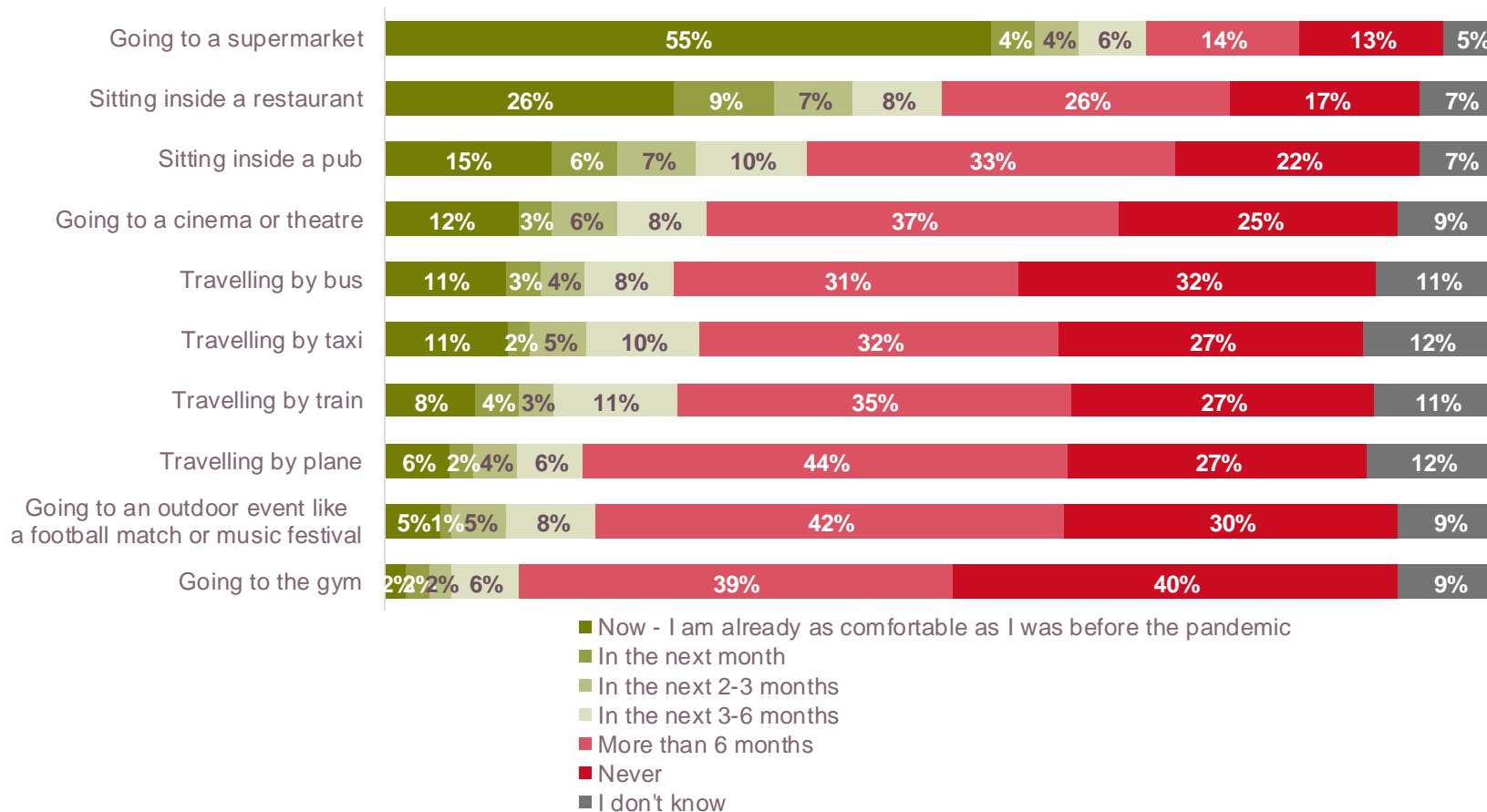
When do you think you will feel as comfortable doing each of the following activities as you felt before the Covid-19 pandemic?



Base: w68 and w69 aggregated. Anxious and Affected. Base sizes range from 279 (gym) to 659 (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

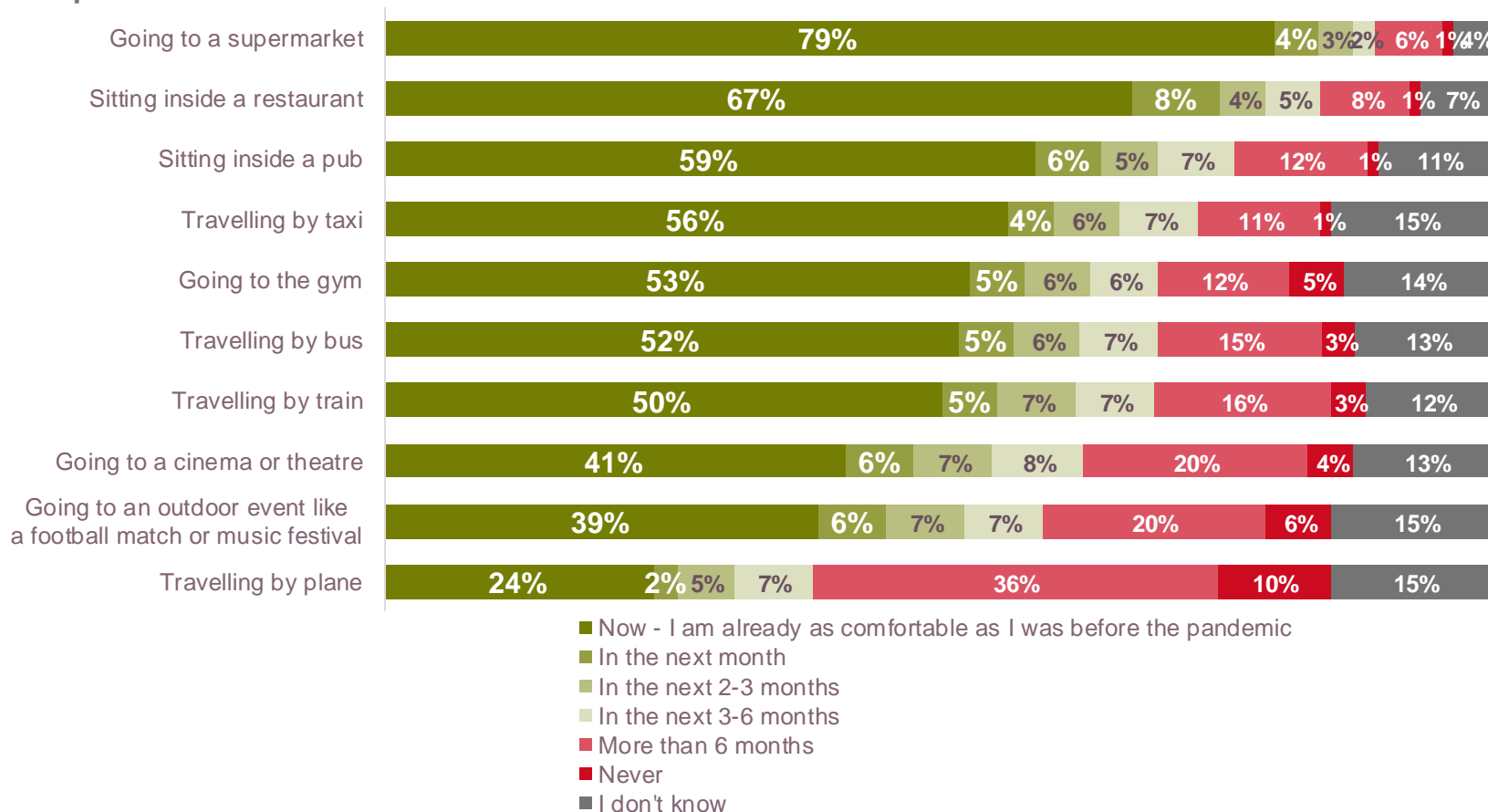
When do you think you will feel as comfortable doing each of the following activities as you felt before the Covid-19 pandemic?



Base: w68 and w69 aggregated. Rethinking Reducers. Base sizes range from 387 (gym) to 597 (supermarket) as excludes 'not applicable'

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

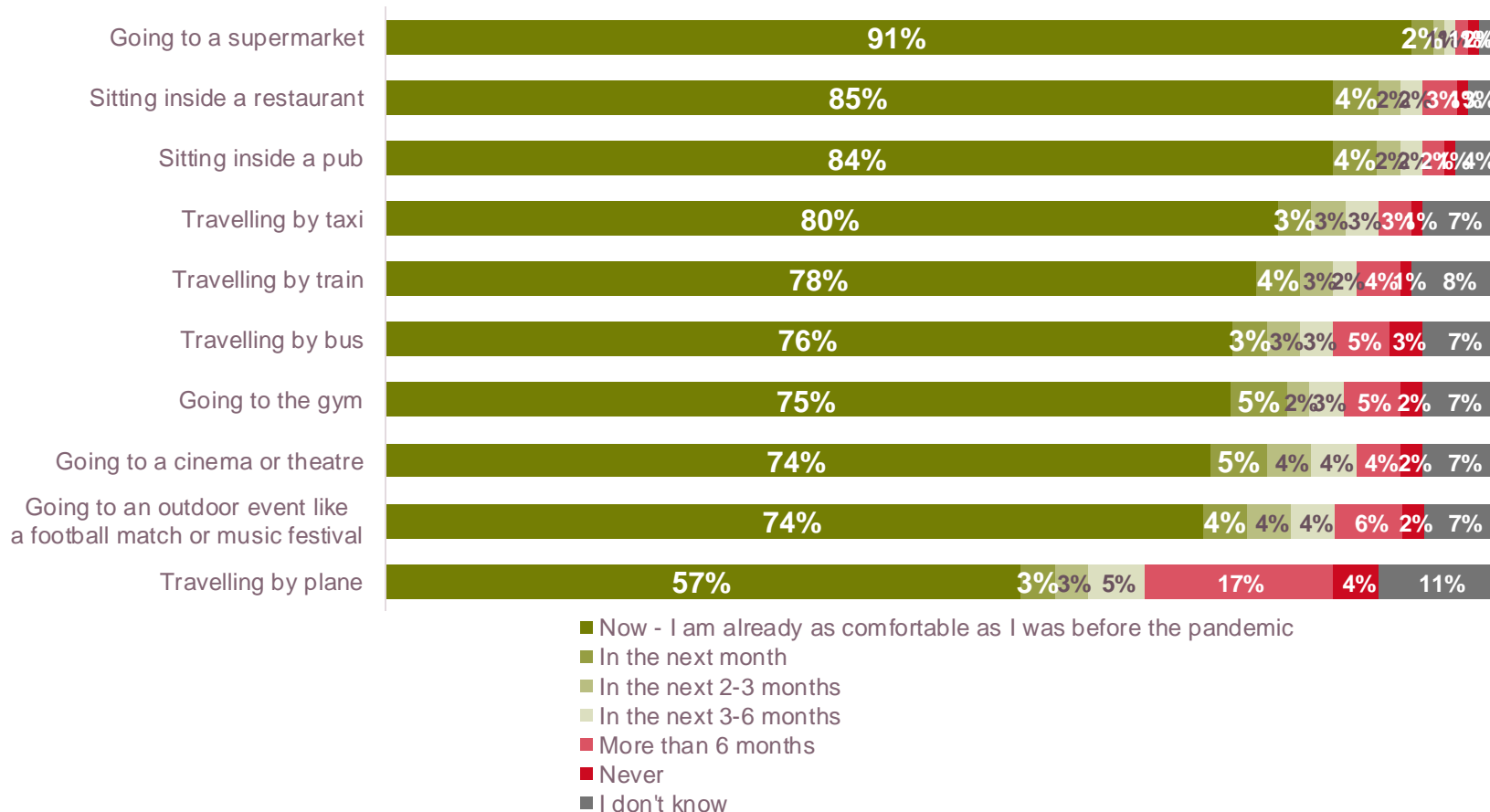
When do you think you will feel as comfortable doing each of the following activities as you felt before the Covid-19 pandemic?



Base: w68 and w69 aggregated. Spring Back Socialisers. Base sizes range from 274 (gym) to 708 (supermarket) as excludes 'not applicable'

# Three quarters 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

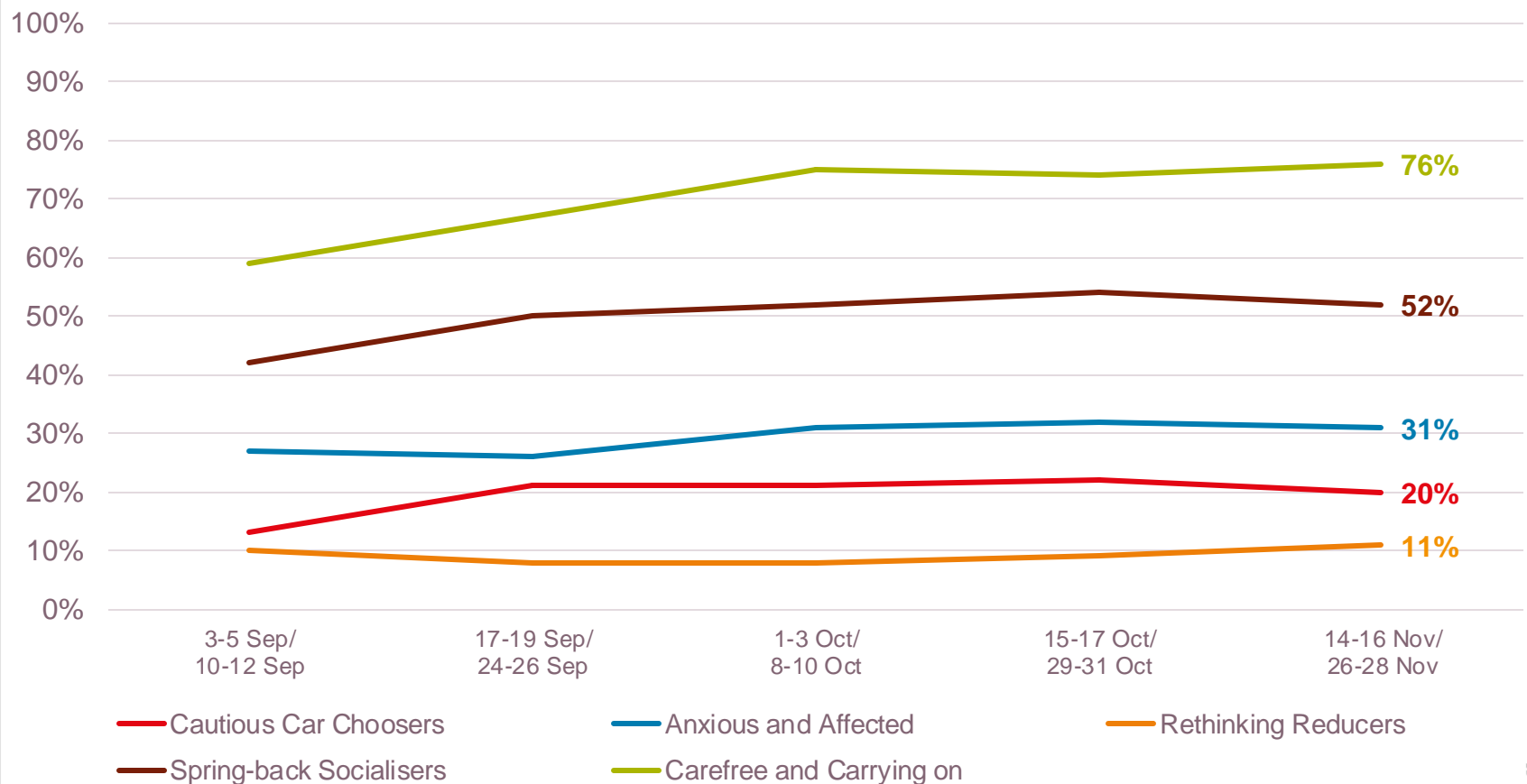
When do you think you will feel as comfortable doing each of the following activities as you felt before the Covid-19 pandemic?



Base: w68 and w69 aggregated. Carefree and Carrying On. Base sizes range from 650 (gym) to 1,315 (supermarket) as excludes 'not applicable'

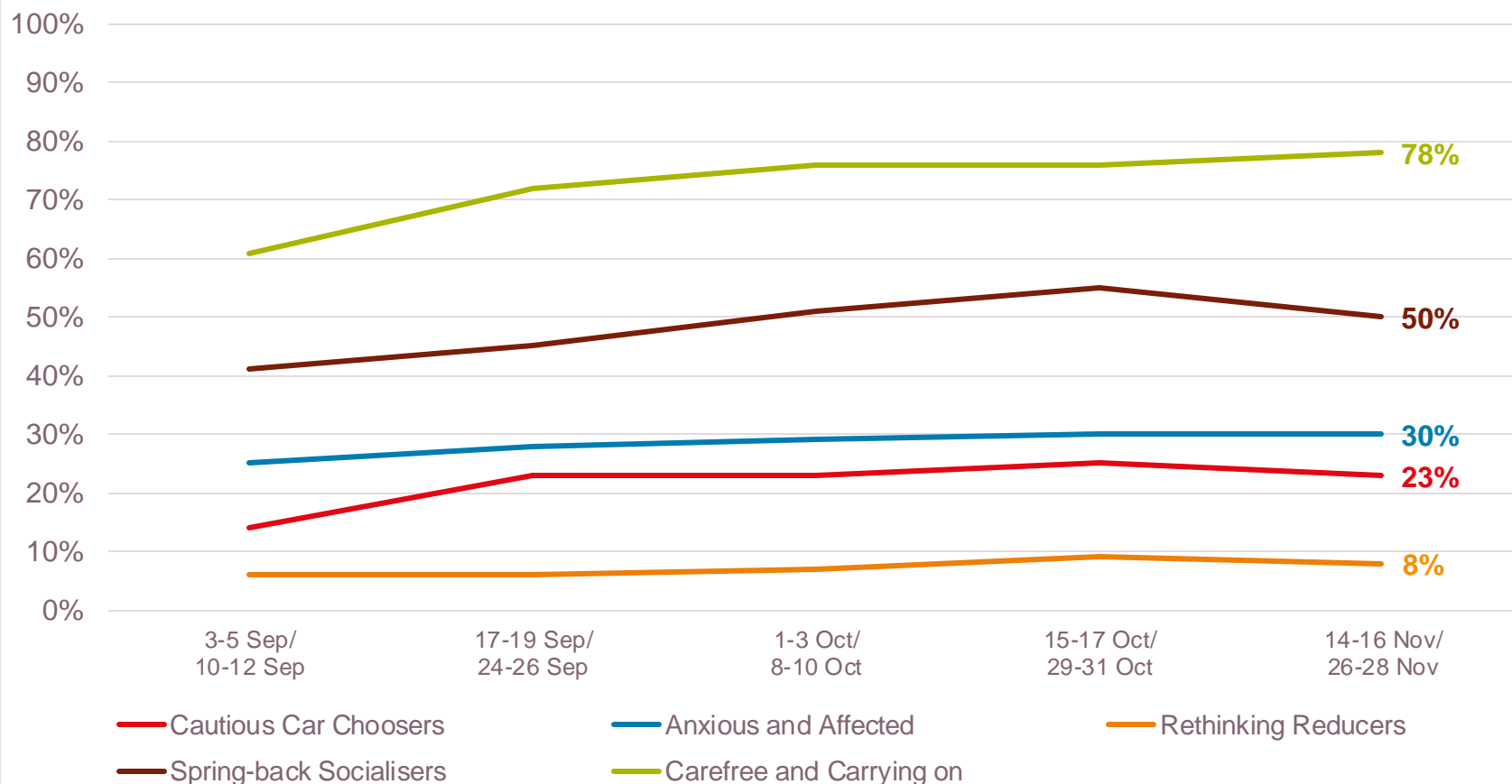
## Those who are Carefree and Carrying On are increasingly more comfortable to travel by bus

When do you think you will feel as comfortable doing each of the following activities as you felt before the Covid-19 pandemic? Travelling by bus  
(% 'Now – I am already as comfortable as I was before the pandemic')



## Those who are Carefree and Carrying On are increasingly more comfortable to travel by train

When do you think you will feel as comfortable doing each of the following activities as you felt before the Covid-19 pandemic? Travelling by train  
(% 'Now – I am already as comfortable as I was before the pandemic')



# 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 67, 68 and 69 which cover train and bus journeys made between 22 and 31 October, 5 and 14, and 19 and 28 November 2021.

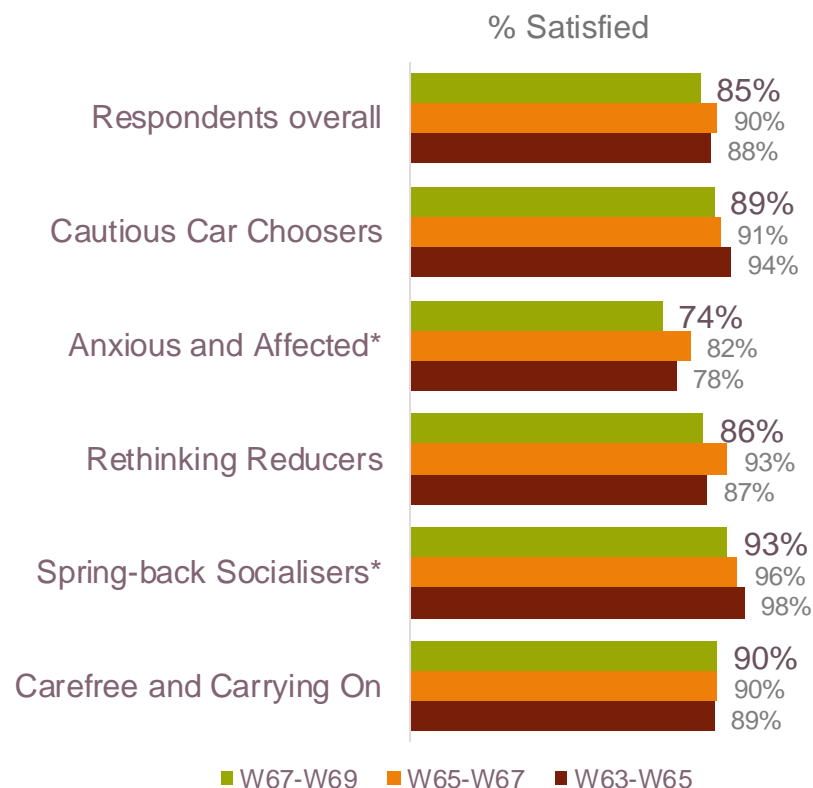
The total number of interviews upon which results are based varies for each aspect of the train/bus journey as 'not applicable' responses are removed from the analysis. Where a result is missing for segment, this is because the rating is based on less than 50 interviews

The range of base sizes across all of the satisfaction measures for each segment is included at the end of this report.

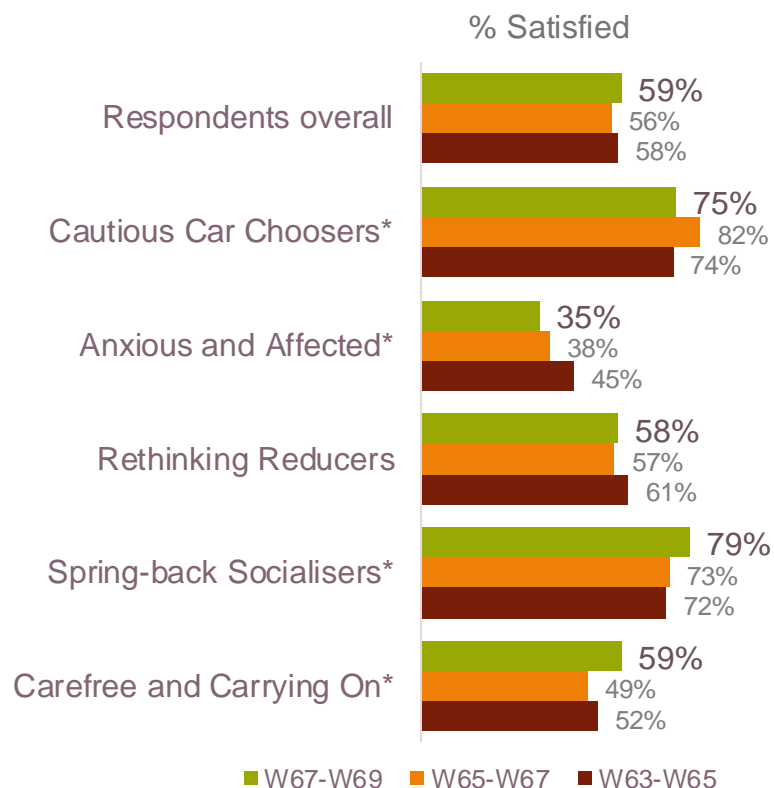
**Spring-back Socialisers are more likely than others to be satisfied with their train journey overall, and with information provided about how busy the train would be. Those who are Anxious and Affected are least likely to be satisfied.**

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

### Overall satisfaction



### Information on how busy the train would be



Base: Omnibus w67-w69 aggregated. Those using a train between 22 and 31 October, 5 and 14, and 19 and 28 November 2021

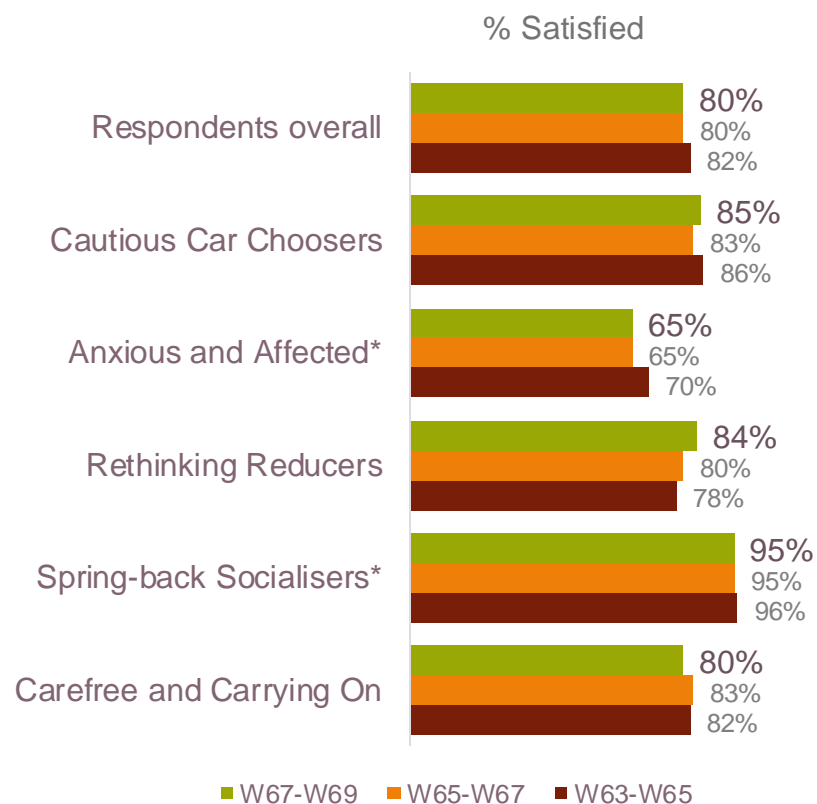
\* Denotes statistically significant difference from respondents overall.



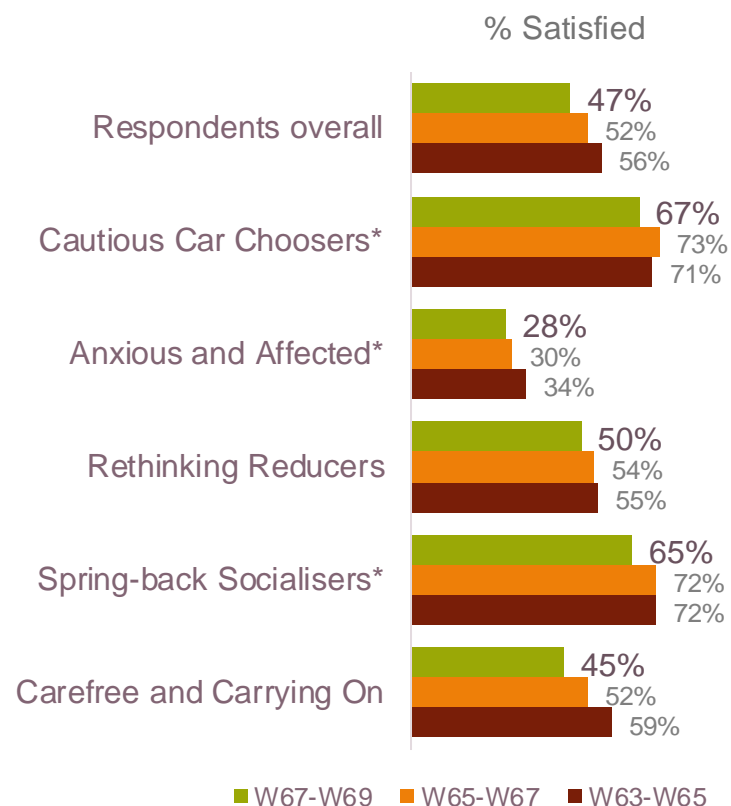
**Spring-back Socialisers are more likely than others to be satisfied with the cleanliness of the inside of the train while Cautious Car Choosers are more likely than others to be satisfied with the number of people wearing face coverings**

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

### The cleanliness of the inside of the train



### Number of people wearing face coverings



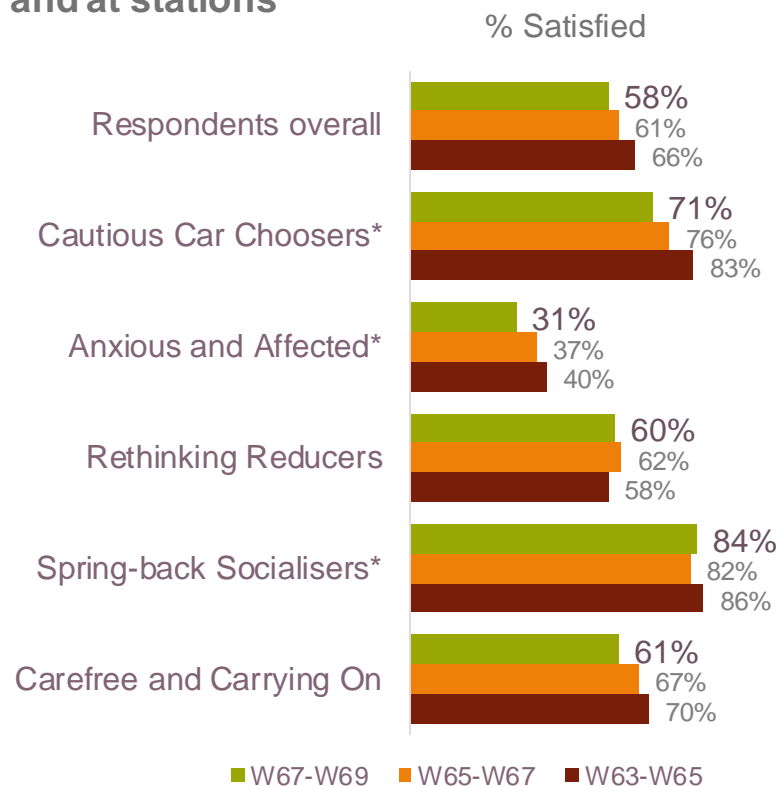
Base: Omnibus w67-w69 aggregated. Those using a train between 22 and 31 October, 5 and 14, and 19 and 28 November 2021

\* Denotes statistically significant difference from respondents overall.

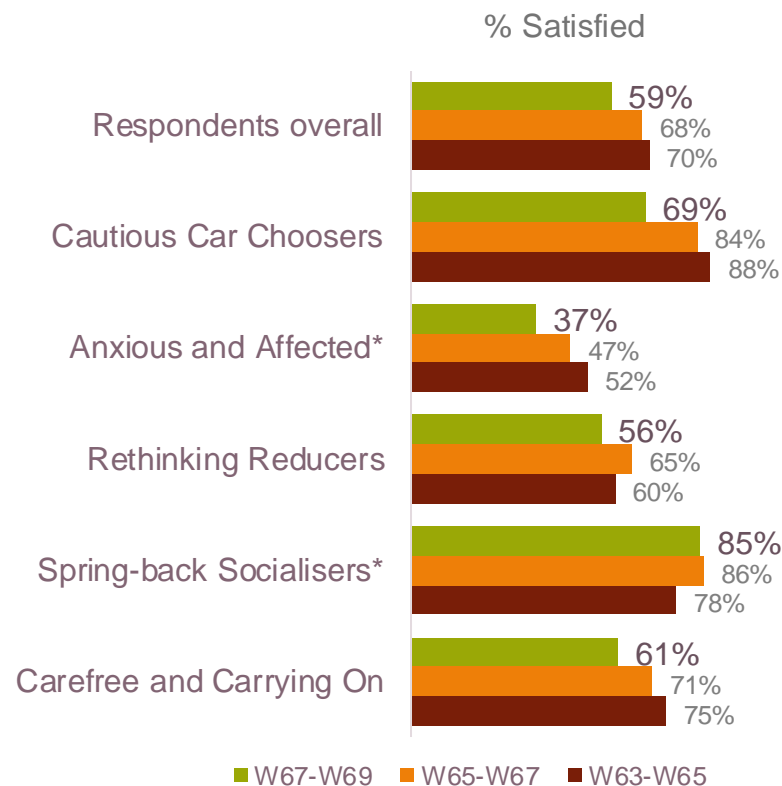
**Spring-back Socialisers are more likely than others to be satisfied with the Covid measures which were in place and with the ventilation on the train. Those who are Anxious and Affected are least likely to be satisfied**

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

**The COVID measures in place on the train and at stations**



**The ventilation on the train**



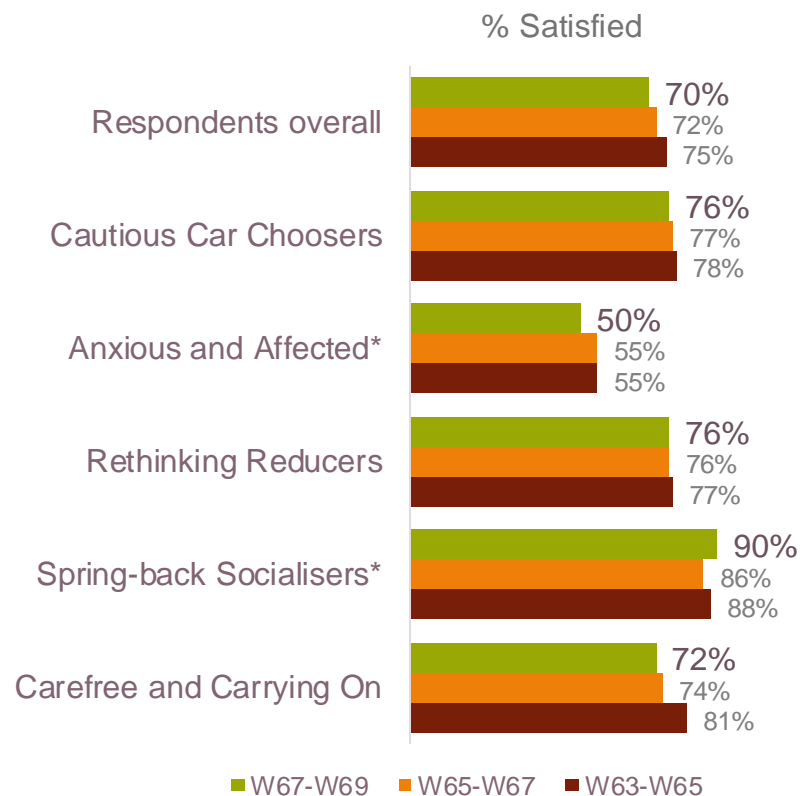
Base: Omnibus w67-w69 aggregated. Those using a train between 22 and 31 October, 5 and 14, and 19 and 28 November 2021

\* Denotes statistically significant difference from respondents overall.

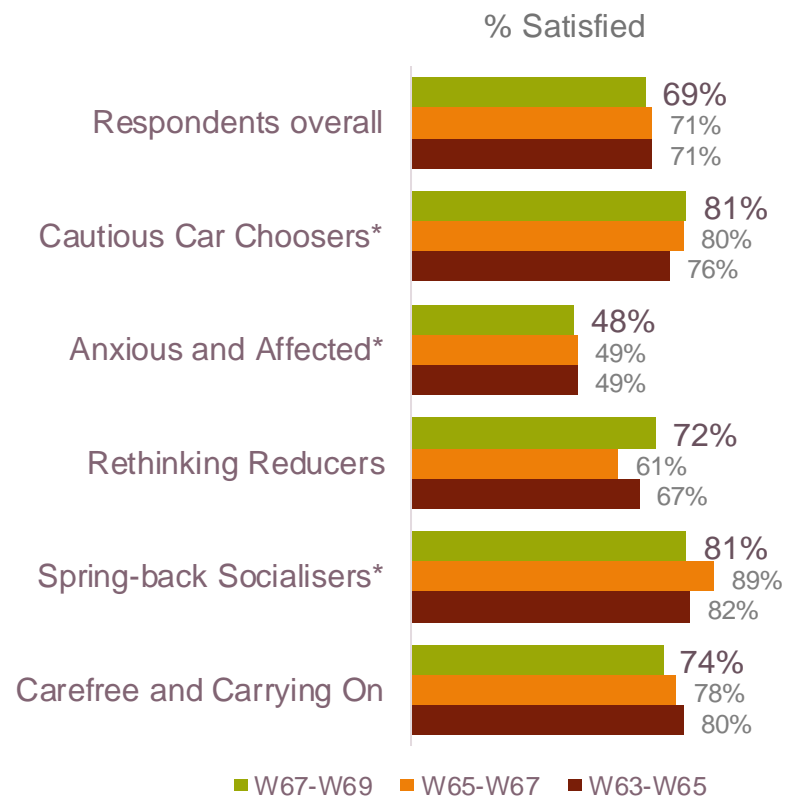
**Spring-back Socialisers are more likely than others to be satisfied with the level of crowding on the train and with the behaviour of other passengers. Those who are Anxious and Affected are least likely to be satisfied with these aspects.**

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

### The level of crowding on the train



### The behaviour of other passengers



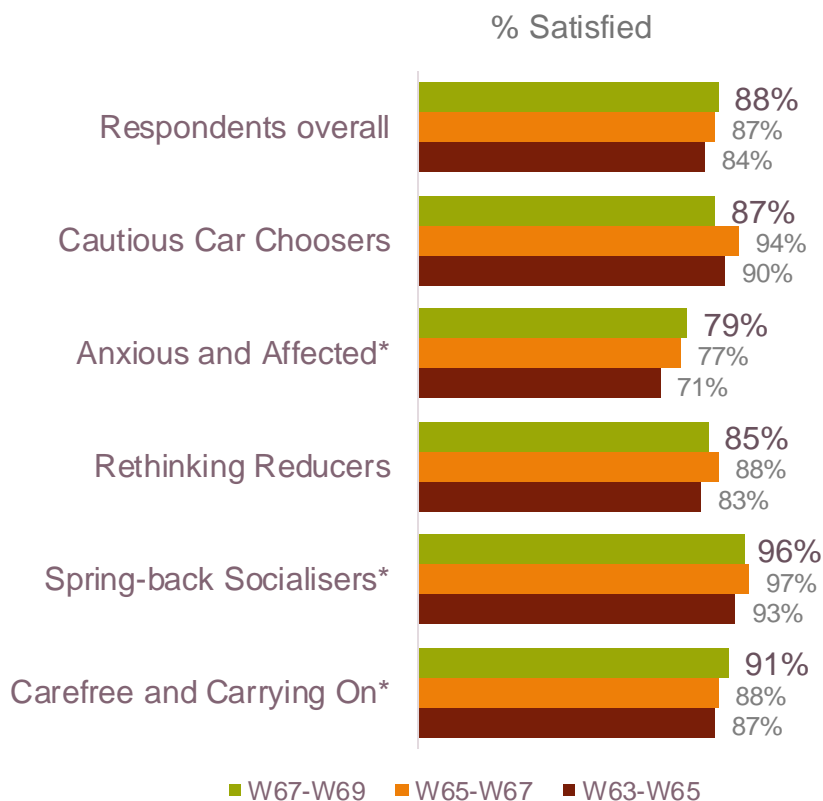
Base: Omnibus w67-w69 aggregated. Those using a train between 22 and 31 October, 5 and 14, and 19 and 28 November 2021

\* Denotes statistically significant difference from respondents overall.

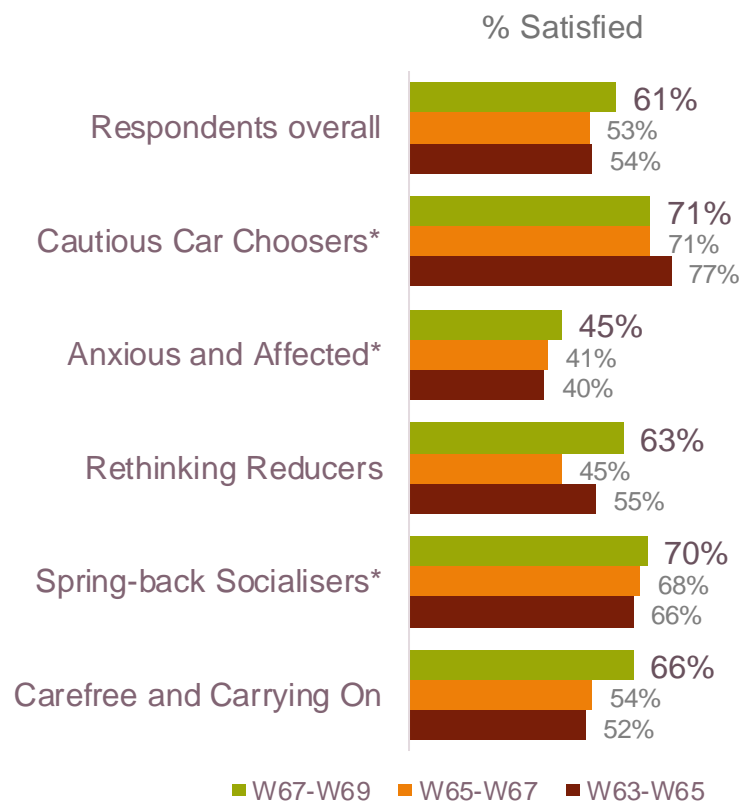
**Spring-back Socialisers are more likely than others to be satisfied with their bus journey overall, while Cautious Car Choosers are more likely than others to be satisfied with the information provided about how busy the bus would be.**

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

### Overall satisfaction



### Information on how busy the bus would be



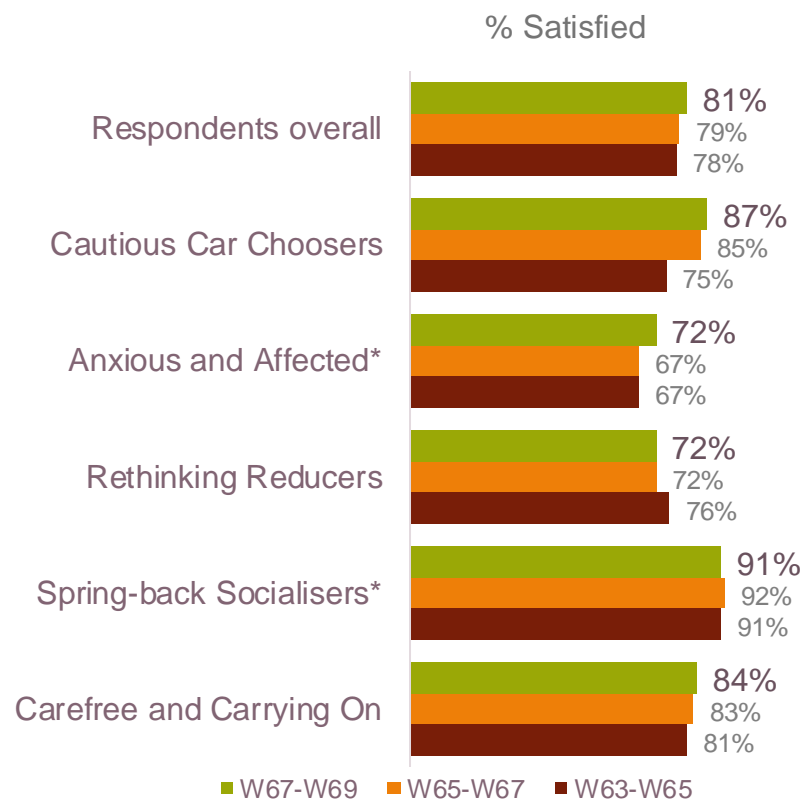
Base: Omnibus w67-w69 aggregated. Those using a bus between 22 and 31 October, 5 and 14, and 19 and 28 November 2021

\* Denotes statistically significant difference from respondents overall.

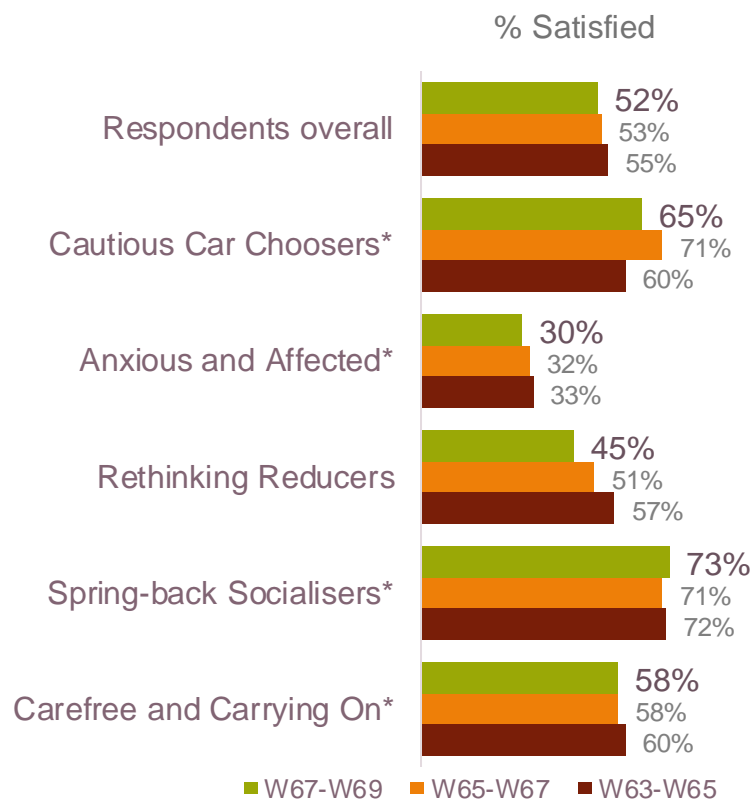
**Spring-back Socialisers are more likely than others to be satisfied with the cleanliness of the bus and the number of people wearing face coverings. Those who are Anxious and Affected are least likely to be satisfied with these aspects.**

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

### The cleanliness of the inside of the bus



### Number of people wearing face coverings



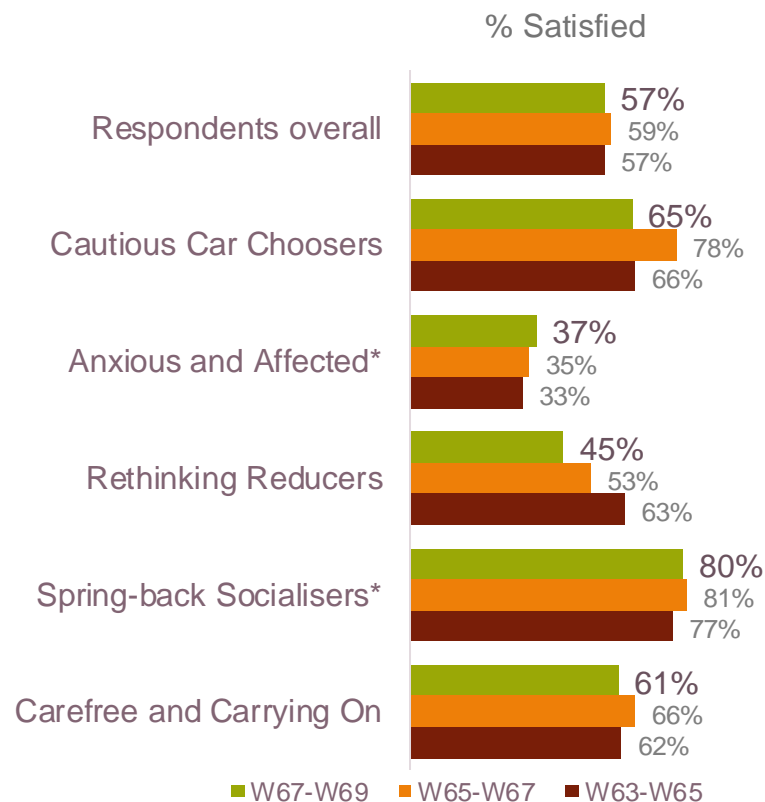
Base: Omnibus w67-w69 aggregated. Those using a bus between 22 and 31 October, 5 and 14, and 19 and 28 November 2021

\* Denotes statistically significant difference from respondents overall.

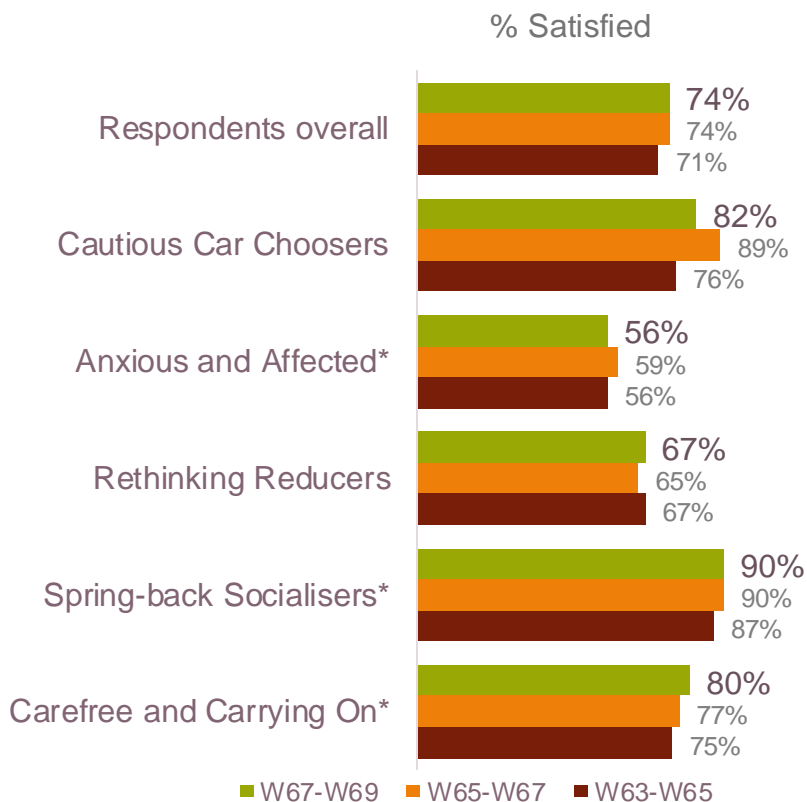
**Spring-back Socialisers are more likely than others to be satisfied with the Covid measures which were in place and with the ventilation on the bus. Those who are Anxious and Affected are least likely to be satisfied with these aspects.**

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

### The COVID measures in place on the bus



### The ventilation on the bus



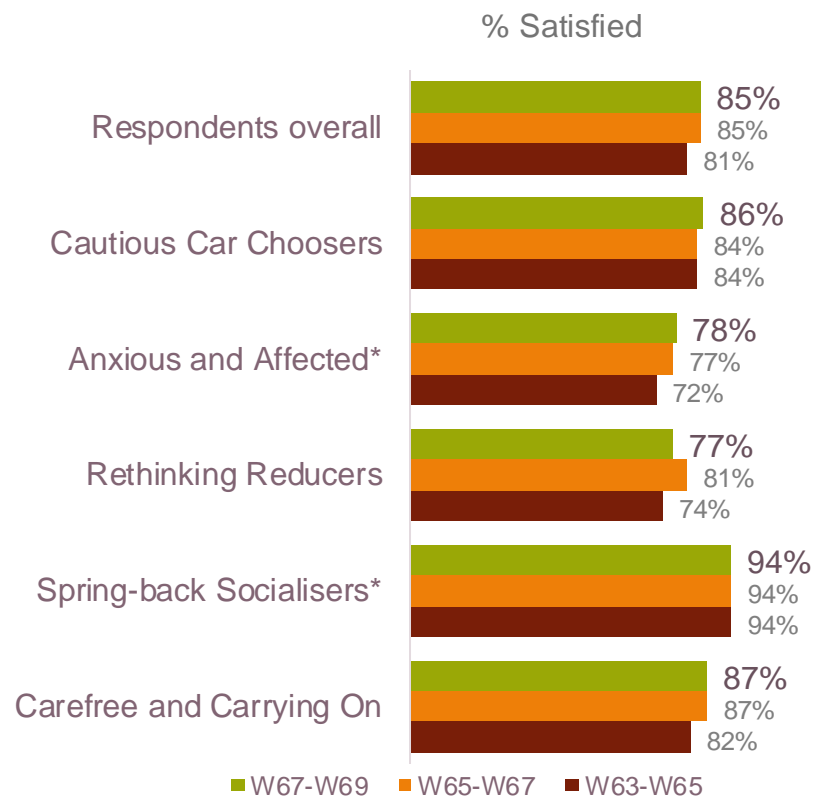
Base: Omnibus w67-w69 aggregated. Those using a bus between 22 and 31 October, 5 and 14, and 19 and 28 November 2021

\* Denotes statistically significant difference from respondents overall.

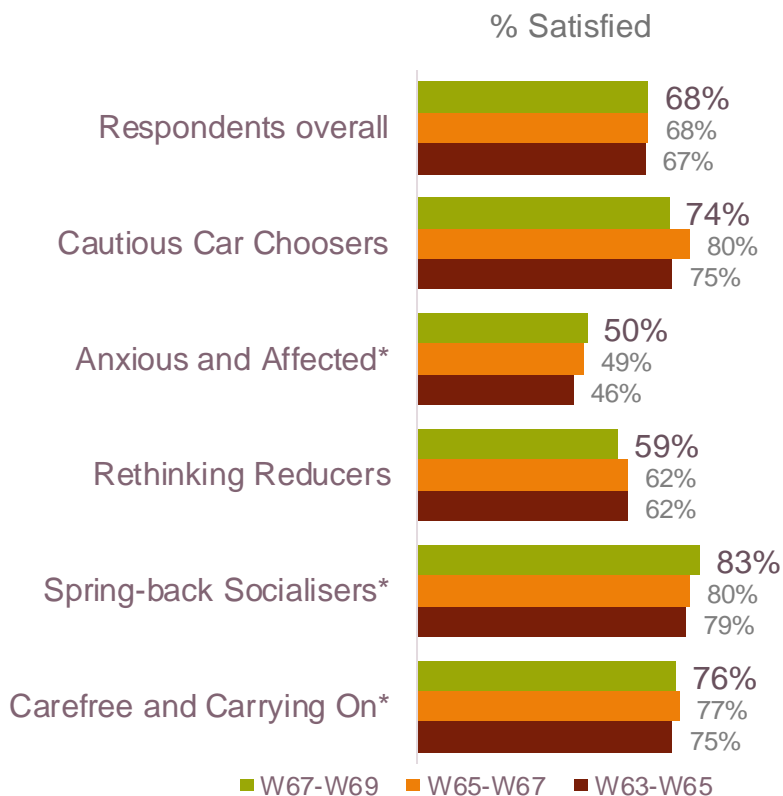
**Spring-back Socialisers are more likely than others to be satisfied with the availability of seating or space to stand and the behaviour of other passengers. Those who are Anxious and Affected are least likely to be satisfied with these aspects.**

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

### The availability of seating or space to stand



### The behaviour of other passengers



Base: Omnibus w67-w69 aggregated. Those using a bus between 22 and 31 October, 5 and 14, and 19 and 28 November 2021

\* Denotes statistically significant difference from respondents overall.

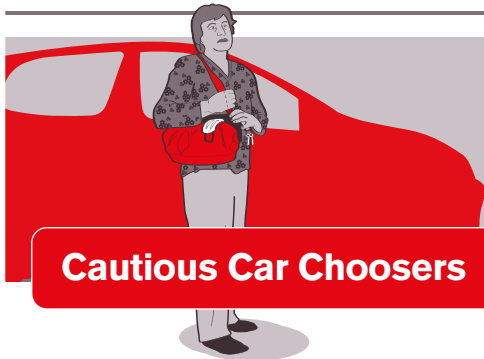
# Meet our segments



**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 64/65

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 68 / 69	4,026	634	663	601	710	1,319	99

# Aggregated w65-w67 base sizes for satisfaction measures

	Users of train	Users of bus
<b>Overall</b>	Range from 628 (overall satisfaction) to 517 (Information on how busy the train would be)	Range from 1,086 (overall satisfaction) to 751 (Information on how busy the bus would be)
<b>Cautious Car Choosers</b>	Range from 63 (overall satisfaction) to 58 (Information on how busy the train would be)	Range from 78 (overall satisfaction) to 69 (Information on how busy the bus would be)
<b>Anxious and Affected</b>	Range from 157 (overall satisfaction) to 119 (Information on how busy the train would be)	Range from 324 (overall satisfaction) to 211 (Information on how busy the bus would be)
<b>Rethinking Reducers</b>	Range from 59 (overall satisfaction) to 54 (Information on how busy the train would be)	Range from 94 (overall satisfaction) to 71 (Information on how busy the bus would be)
<b>Spring-Back Socialisers</b>	Range from 108 (overall satisfaction) to 91 (Information on how busy the train would be)	Range from 223 (overall satisfaction) to 150 (Information on how busy the bus would be)
<b>Carefree and Carrying On</b>	Range from 238 (overall satisfaction) to 192 (Information on how busy the train would be)	Range from 364 (overall satisfaction) to 247 (Information on how busy the bus would be)

## Contact Transport Focus

Any enquiries about this report should be addressed to:

Toby Cotton

Senior Insight Adviser

[Toby.cotton@transportfocus.org.uk](mailto:Toby.cotton@transportfocus.org.uk)

Transport Focus

Albany House

86 Petty France

London

SW1H 9EA

[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.**