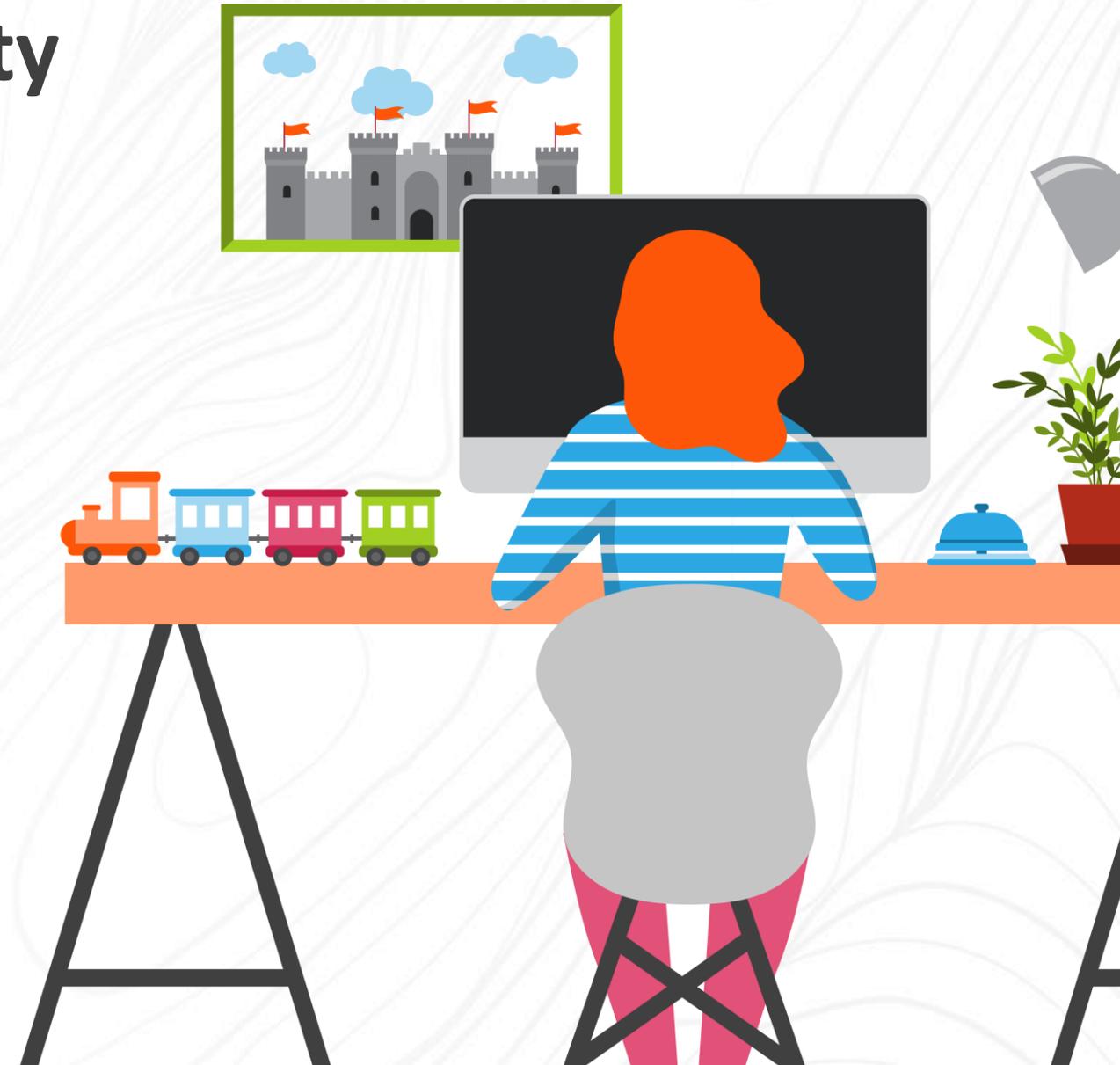


Travel, Leisure & Hospitality

Tracking consumer sentiment
on the impact of COVID-19

Weekly Update - 27th March 2020



ALLIGATOR

Introduction

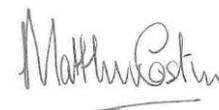
There is no way of sugar-coating the impact of the COVID-19 crisis on the UK travel, leisure and hospitality sectors. Many of us remember the 2008 crash only too well, but the unprecedented restrictions imposed on people's movements and the near impossibility of going about our daily lives, represent a hammer blow like nothing we have faced in our lifetimes.

But when the going gets tough, the tough get going. While we watch amazed, inspired and grateful in equal measure for the bravery of our frontline NHS and emergency services staff, all of us can play some role, however small, in nursing our society, economy and sectors back to health.

At BVA BDRC and Alligator Digital, our intention is to use the tools of our trade to help our clients and industry stakeholders make sense of the current uncertainty. This is the first in a weekly series of reports which will monitor the mood of UK consumers, the extent to which the worst is still to come or behind us, what is being spoken about online, as well as changes to anticipated buying / booking lead-times as time passes.

We wish you, your families and businesses all the very best during this period. If you have any questions on this report or if we can support you in any other way, please do not hesitate to get in touch with us.

Best wishes,



Matt Costin
Managing Director, BVA BDRC



Suzy Hassan
Managing Director, Alligator Digital

Executive Summary

Unsurprisingly in these unprecedented times, our national mood in the UK is not universally positive – **87% of us fear that the worst is to come** – in line with the dire warnings from our leaders about further casualties from COVID-19 and significant pressure on our NHS.

The reaction of the travel, leisure and hospitality sectors has, on the whole, been well received by consumers – but the current fog of uncertainty means that most simply don't know when life will be back to normal, or when holidays, flights, hotel rooms, and days out will be booked again. 50% of those who have recently booked a flight, holiday, hotel room or paid-for accommodation, have had to cancel their booking.



Drivers of positive and negative sentiment should make interesting reading for brand owners and marketers, as the effects of this crisis are likely to be far-reaching. **Kindness** and **generosity**, but also **innovation** in findings ways of delivering services flexibly are some of the attributes which have driven positive sentiment during the crisis so far.

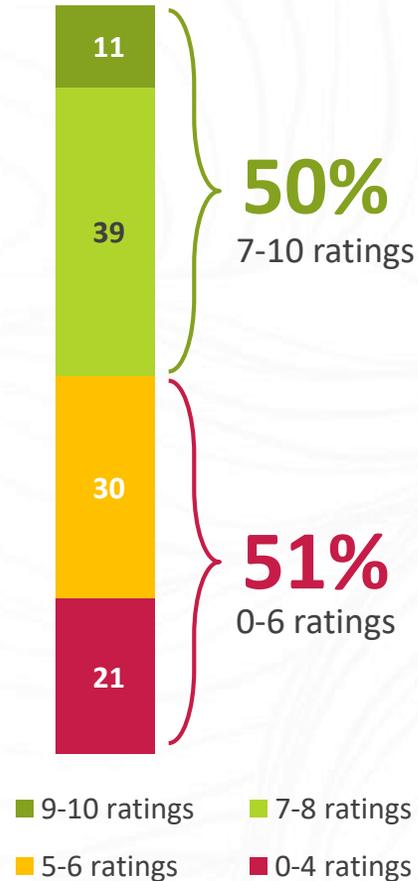
In the midst of the financial turmoil caused by the crisis, hospitality brands which have supported frontline NHS workers and the homeless have received significant praise, while the readiness of visitor attractions to deliver experiences through digital channels has impressed visitors and commentators alike.

Balancing these positives, not all brands have been seen to do the right thing – and some have seen a significant backlash from decisions perceived as ungenerous in the circumstances. In addition, the spotlight has been thrown onto service resilience and the inability of some companies' systems to cope with much higher demand for customer contact.

The mood of the nation is far from consistent: half of us remain broadly upbeat (7+ / 10)

Q5: How would you rate, between 0 and 10, your mood today? (%)

23-24 March 2020
Average mood
6.1



One of the variables in which difference in mood is evident, is age cohorts. While the elderly are most 'at risk' from COVID-19, they also have the most buoyant mood – perhaps reflecting less disruption to family and working lives

18-45 years old

Average mood
6.1



46-64 years old

Average mood
5.4



65+ years old

Average mood
6.9



Our national mood is near-identical to our neighbours across The Channel, though in France there is evidence of a gradual upturn

Q5: How would you rate, between 0 and 10, your mood today?

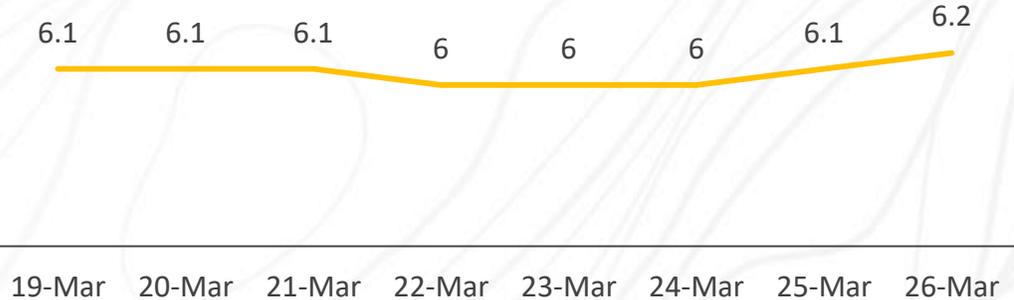
23-24 March 2020
Average mood
6.1



The COVID-19 emergency reached a crescendo in France somewhat earlier than in the UK. BVA Group's daily tracking shows the average national mood hovering around 6 / 10 – but nudging upwards in recent days



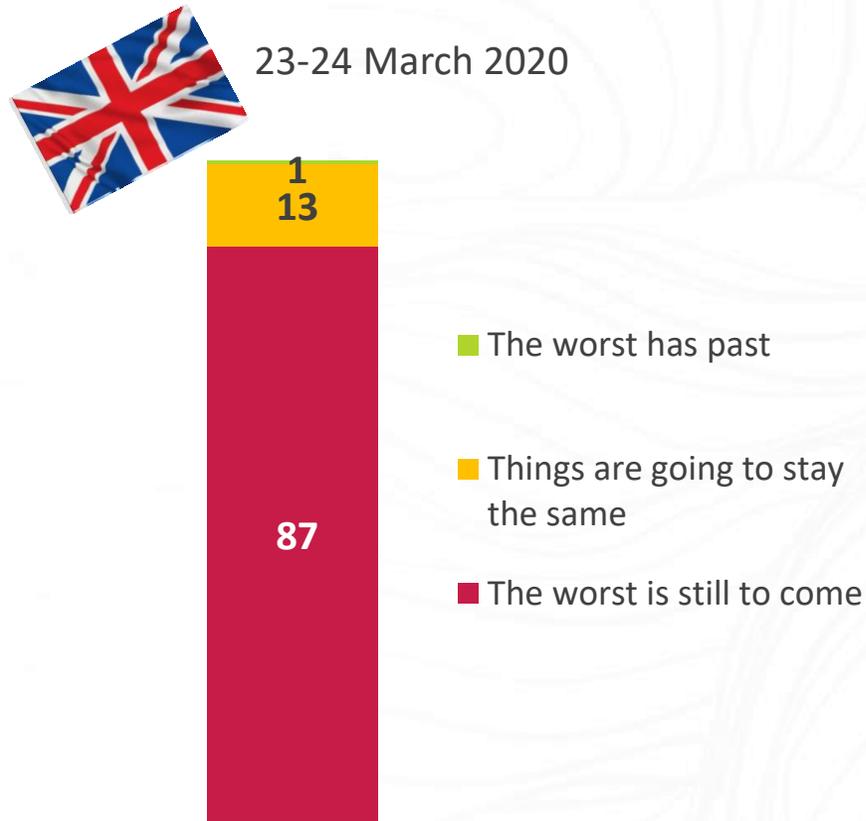
Average mood in France – French respondents*



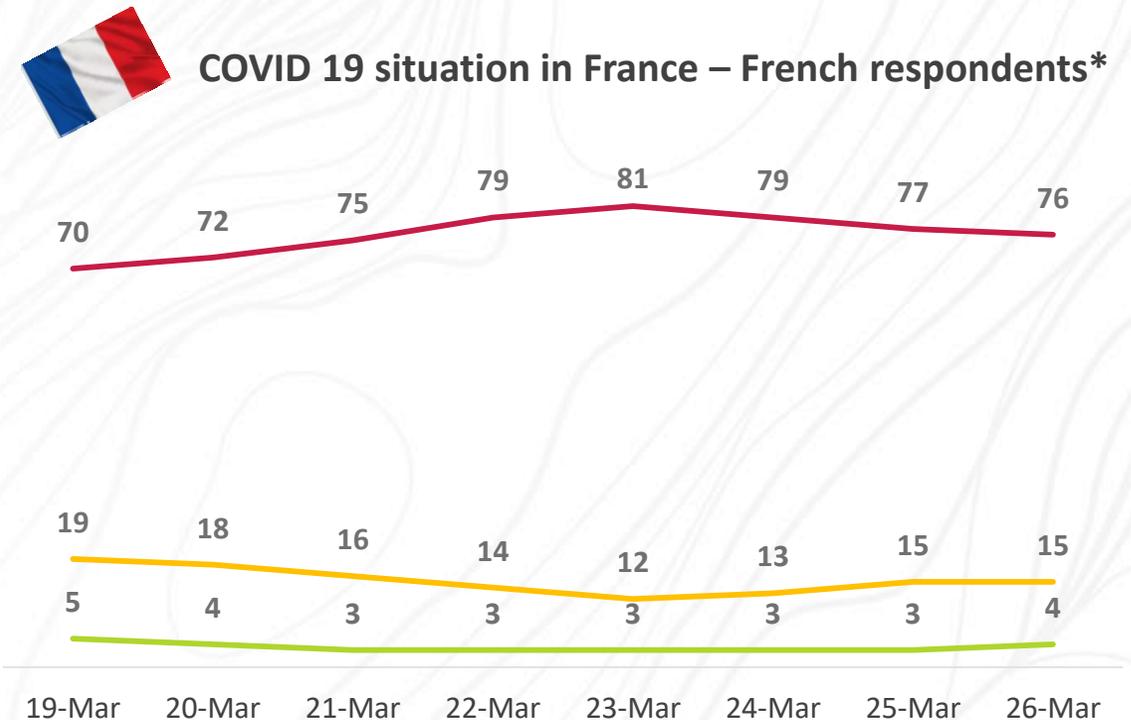
*BVA daily tracker on how the situation is changing in France. More info, contact Adélaïde ZULFIKARPASIC (adelaide.zulfikarpasic@bva-group.com)

Nearly 9 in 10 Brits believe that the 'worst is yet to come' - a higher proportion than has been recorded at any point in the crisis in France

Q7: Regarding the situation of Coronavirus in the UK and the way it is going to change in the coming month, which of the following best describes your opinion? (%)



Having gone into 'lockdown' several days earlier, French pessimism reached a peak on 23rd March. Since then, more French people are forecasting that there will be no immediate change – but there is yet to be an uplift in the proportion who believe 'the worst has past'

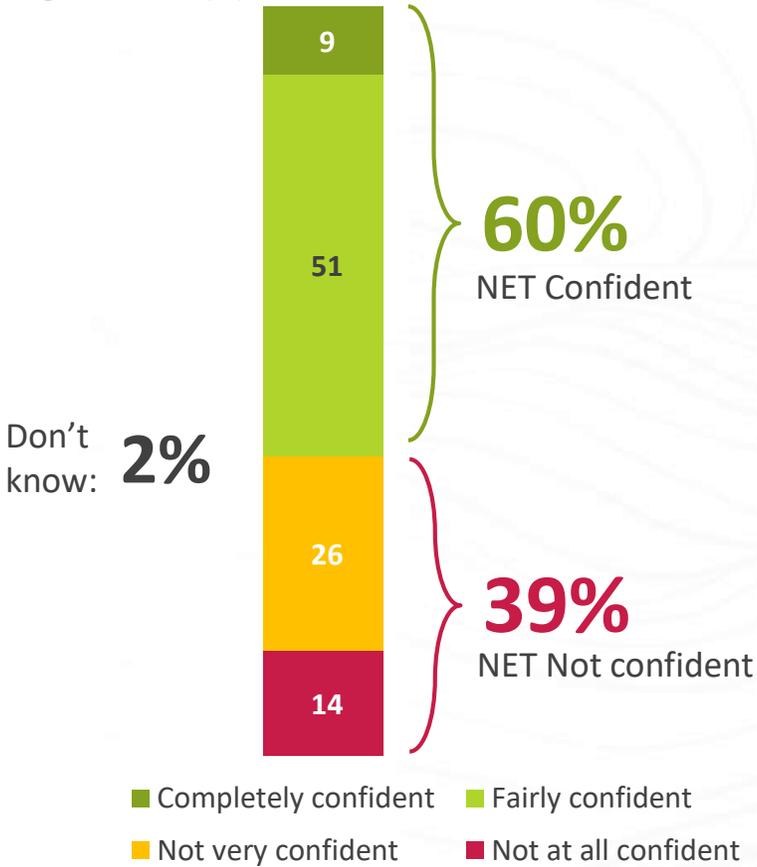


Q7: Regarding the situation of Coronavirus in the UK and the way it is going to change in the coming month, which of the following best describes your opinion? (%)

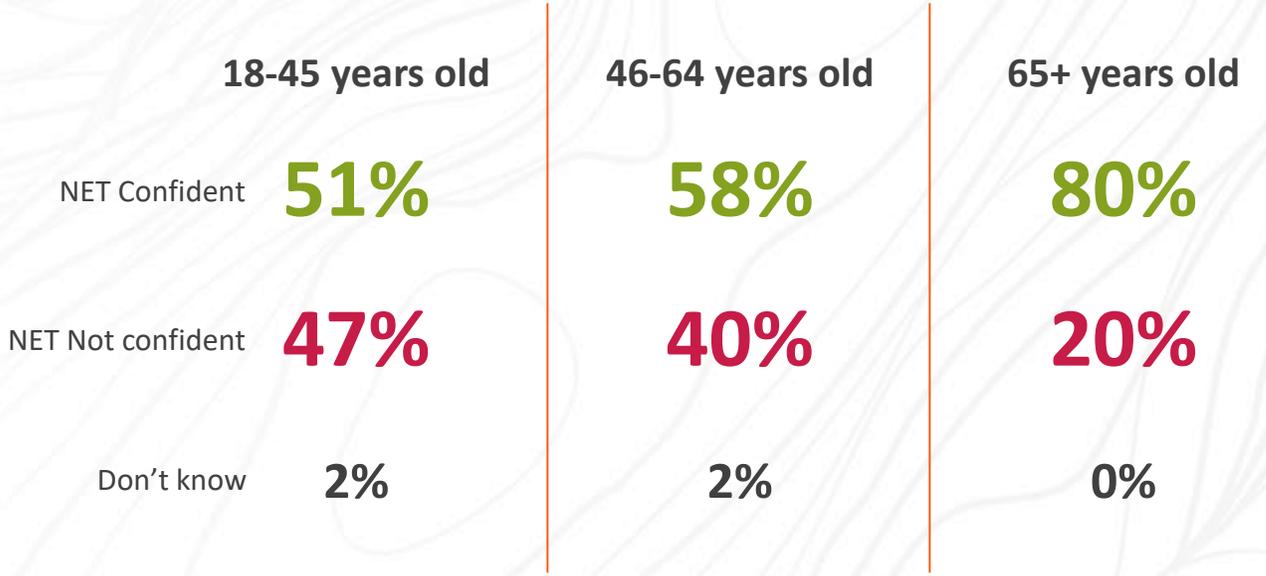
*BVA daily tracker on how the situation is changing in France. More info, contact Adélaïde ZULFIKARPASIC (adelaide.zulfikarpasic@bva-group.com)

The British Government has faced criticism in some quarters for a perceived failure to act quickly enough – but 3 in 5 are confident in the Government's handling of the emergency

Q6: Would you say that you are completely confident, somewhat confident, not really confident, not at all confident regarding how the British government is handling the crisis? (%)



Confidence in the British Government's handling of the emergency varies by age-group – though in part this reflects traditional party-political allegiances, with 4 in 5 over 65s backing the Government, but almost half of the Under 45s 'not confident'



Q6: Would you say that you are completely confident, somewhat confident, not really confident, not at all confident regarding how the British government is handling the crisis? (%)

Consumer perception of how key sectors have responded to the crisis has been more positive than negative – though transport operators have come in for criticism on social media

	Response Index (0 = Neutral)	Social media Net Sentiment (0 = Neutral)	
Visitor attractions	32	20	Leisure
Holiday companies	15		
Hotels	24	10	Hospitality
Other paid for accommodation providers (e.g. Airbnb)	13		
Airlines	12	-33	Transport
Other public transport companies (e.g. Uber)	9		
Airports	6		
Train operating companies	5		

Sentiment online (as recorded through NetBase) broadly aligns with the ratings recorded in our survey: attractions emerge as the strongest here – largely thanks to the original decision to keep gardens and parks open – but also because of the innovation evident in delivering the visitor experience through digital channels.

The **Response Index** represents consumer perceptions of how effectively each sector has responded to the emergency. It is calculated simply by subtracting the proportion of those who think the sector response is poor or very poor, from the proportion who perceive it to be good or excellent. Zero therefore reflects a neutral score, with >0 meaning positive, and < 0 meaning negative.

Social media **Net Sentiment** works on the same scale, expressing the ratio of positive to negative online discussion about conversation linked to the COVID-19. Categorisation of sentiment to 'positive' or 'negative' is approximately 90% accurate.

Q8. The UK's leisure, travel, tourism, hotel and hospitality sectors have been severely impacted by the current crisis. Companies and organisations in these sectors have responded in different ways to the challenges they face. Overall how would you rate the response of the following to the current crisis?

Key themes underlying positive and negative sentiment

“As a Liverpool fan it pains me to agree with these Manchester United legends... but fair play to them opening their hotels to our @NHSuk staff...something's are far more important like survival #COVID—19”
Kindness & Generosity

“Be patient. Imagine everyone asking the same question. Then some asking several in minutes no help. They're not going to tarmac over the Channel. Services will resume when they can. Brittany Ferries nor scientists can say when as nobody knows. Take a voucher.”
Patience

The key themes underscoring positive and negative sentiment are instructive for marketers and brand owners and may point to the longer term ingredients of success: a sense of **kindness** and **generosity, patience**, and a **spirit of innovation** underpin much of the positive sentiment apparent online.

“Wherever we can, we want to make sure True Hospitality shines through in even the most challenging of times, which is why we're pleased to be working with @MayorofLondon Sadiq Khan, to provide the city's rough sleepers with a safe place to self-isolate at two of our London hotels”
Kindness & Generosity

“@bookingcom my husband is losing nearly £500 on a BnB in Paris that he now can't go to because of #COVID—19”
Selfishness

“@British_Airways we are UK citizens & arrived in Florida last Friday. Our return flight is booked for May 20th. I am worried that by then all flights will be cancelled and we won't get home. Have tried calling you but can't get through.”
Loss of service continuity

“Fabulous decision, we need the great British outdoors more than ever at this challenging time!”
Innovation

“@Brittaniahotels. The despicable way you have let your staff down leaves a bad taste in our mouths”
Selfishness

“It's fabulous we can take a Virtual Tour of @britishmuseum Rosetta Stone, Sutton Hoo Hoard, Queen I... youtu.be/tJBqRPWLS6Y via @YouTube”
Innovation

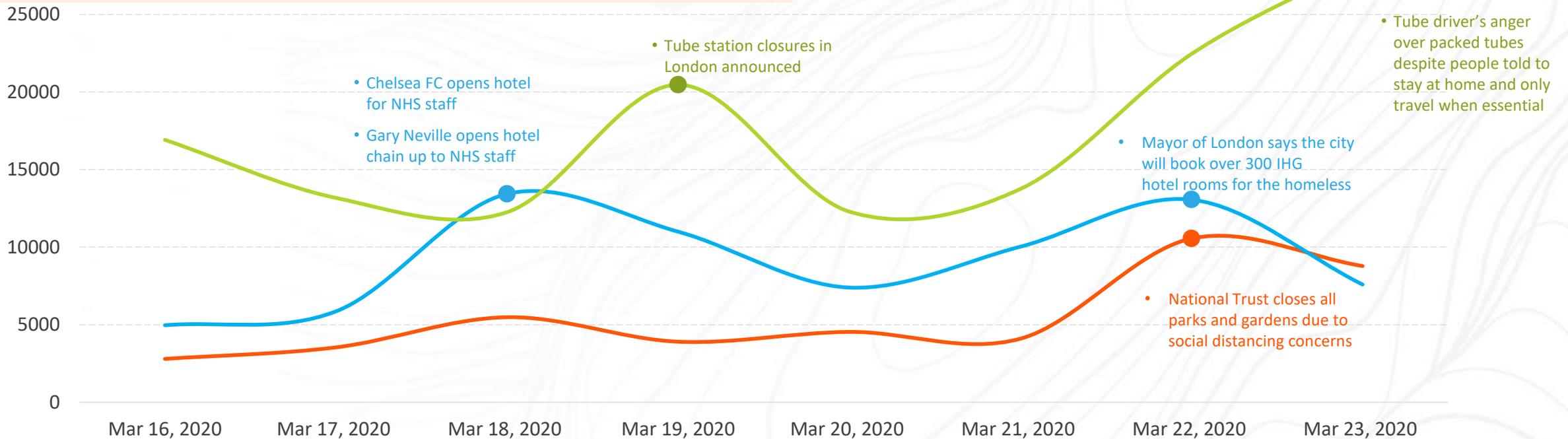
“Tfl's coronavirus refund is a work of genius - website tells you to call, calling puts you through 2 min of pre-recorded options, says they're busy and then disconnects your call instead of putting you on hold. Repeat ad nauseam, hope to get your £ back some day”
Failing systems

“Having the central line 20 mins apart is too long a gap and is not good for social distancing! As a nurse trying to get to work the long gaps in service from west Ruislip is not protecting me. Need more frequent trains please! @centralline”
Loss of service continuity

Volume of social media comment across key sectors

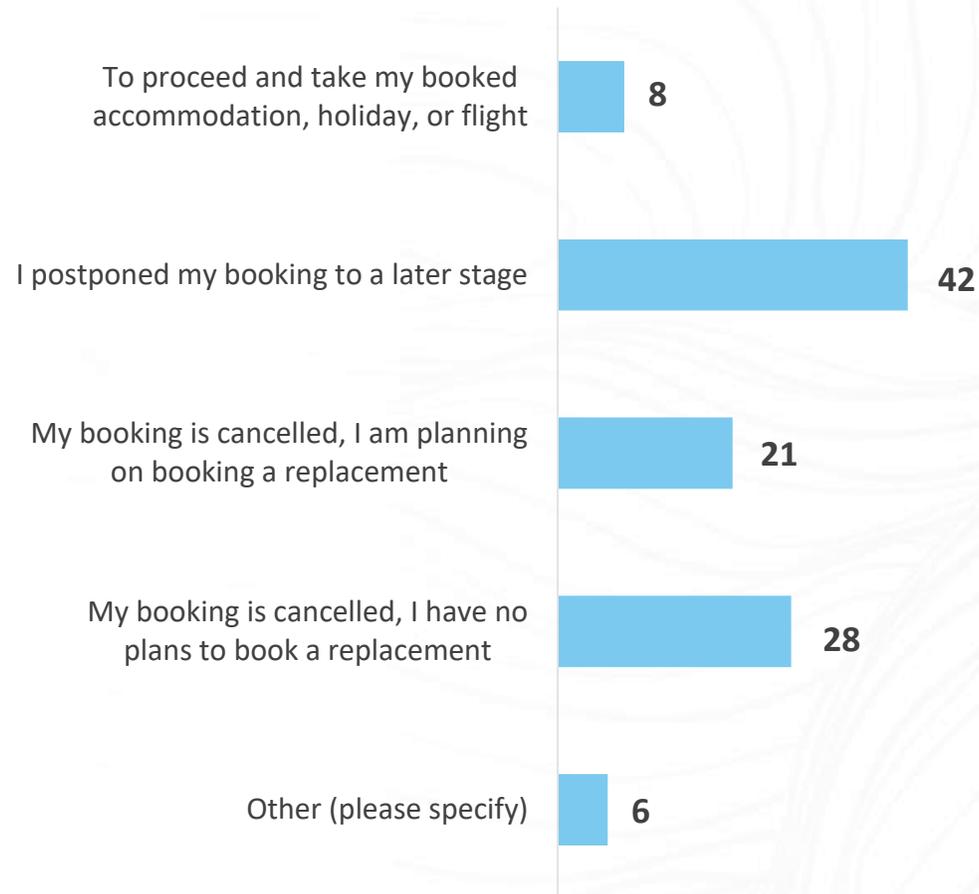
- Across these 3 related verticals, Transport has consistently generated the most social media posts in relation to the crisis – and continues to climb
- For hospitality, the peak was reached on 18th March, driven by positive reaction to the decisions of Gary Neville and Chelsea FC to open their hotels to NHS staff
- Leisure has seen relatively fewer online conversations, though the National Trust – and particularly access to its parks and gardens – has been widely talked about

— Leisure — Hospitality — Transport



Future booking – what are the plans now?

Q13. You've mentioned earlier that you have booked accommodation, a holiday or a flight, and that you haven't taken it yet. Given the current situation what are your plans now? (%)



The terrible blow landed on the travel sector by the crisis is evidenced by the fact that nearly 50% of those who have recently booked a flight, holiday or accommodation, have cancelled the booking outright. Nearly 2 in 5 state that while they have not cancelled, they are postponing – striking a further blow to cashflow

“It is not cancelled as such but I guess it won't be happening and that is okay. Let's just stay alive.”

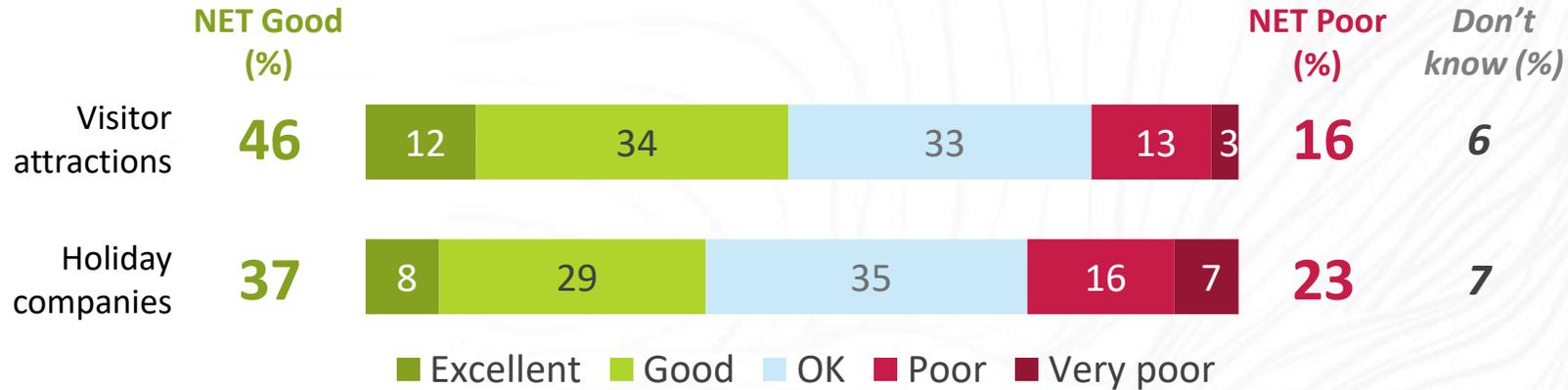
“I haven't yet cancelled as I have been told if you cancel you will not be reimbursed”

Leisure



Leisure sector's response to current crisis

Q8. Overall how would you rate the response of the following sectors to the current crisis?



- There are more positive than negative perceptions of the leisure sector's response to the crisis – though inevitably there is some criticism too.
- Holiday companies have been at the sharp end of business contraction so far, yet customers re-booking or postponing holidays should have received either financially protected refund credit notes or cash refunds.
- Visitor attractions have been quick to re-direct visitors to their digital offer whilst the National Trust have been applauded for its balanced response.

Q10: Are there any examples you have seen of companies in any of the leisure sector who have responded to this situation particularly well?



“My gym and local swimming pool closed very early into this virus without being told to.”

“The National Trust has been very sensible”

Q8. The UK's leisure, travel, tourism, hotel and hospitality sectors have been severely impacted by the current crisis. Companies and organisations in these sectors have responded in different ways to the challenges they face. Overall how would you rate the response of the following to the current crisis?

Q10: Are there any examples you have seen of companies in any of the leisure sector who have responded to this situation particularly well?

Positive online reaction to the National Trust's initiative (1)



NT's announcement that they will keep their gardens and parks open for free was well received by posters online, highlighting people's need for that outdoor space in these difficult moments.



We're aiming to open many of our gardens and parks for free during this difficult time, so the nation can use open spaces to relax and refresh, while following the government's social distancing guidance. We will be closing our houses, cafés and shops this week.



4:59 pm · 17 Mar 2020 · Hootsuite Inc.

14.2K Retweets 34.6K Likes

“This is wonderful. As a National Trust member, I urge those who are not to go and explore nature and breathe in good air.”

“Lovely gesture. As a member, I know how nice some of these places are as there is plenty of room for people to move about and still be socially distant. It is amazing how a nice walk clears the head and can change the mood.”

“I am a NationalTrust member and think it's brilliant idea to open the @NationalTrust gardens and open spaces to everyone during this #Coronavirus epidemic . Nothing better than fresh air and exercise to feel good!”

“Lovely idea. Thank you for your kind gesture and very welcome gesture to open your parks and gardens for free BlossomSunflowerBlossom. This will make such an important difference to many people's wellbeing”

Positive online reaction to the National Trust's initiative (2)



The National Trust was not held responsible for the lack of personal responsibility opening their sites generated. Hopefully with lessons learnt the opportunity to re-open in the future can be more strictly managed and better respected.

“ RT @IsabelHardman: This is really sad. National Trust closing its parks and gardens [nationaltrust.org.uk/press-release/...](https://nationaltrust.org.uk/press-release/) ”

“ RT @uk_domain_names: National Trust is closing its parks and gardens from tonight, basically because far too many people piled into them today (I'm paraphrasing - they're more diplomatic!) This is why we can never have nice things. [nationaltrust.org.uk/press-release/...](https://nationaltrust.org.uk/press-release/) ”

“ I drove past Lyme park today and couldn't believe how many people were there. Sadly, I think this is the right decision. You give an inch, people take a mile :(”

“ People congregating in parks & on National Trust land. It's utter madness. Its wonderful to see the sun, but where is PERSONAL RESPONSIBILITY in this total disregard of social distancing? Does the government have to legislate for everything? bbc.co.uk/news/uk-englan... ”



We've taken the decision to close our parks and gardens to restrict the spread of coronavirus. Our countryside and coastal locations remain open with parking charges waived, but we encourage people to stay local and observe social distancing.

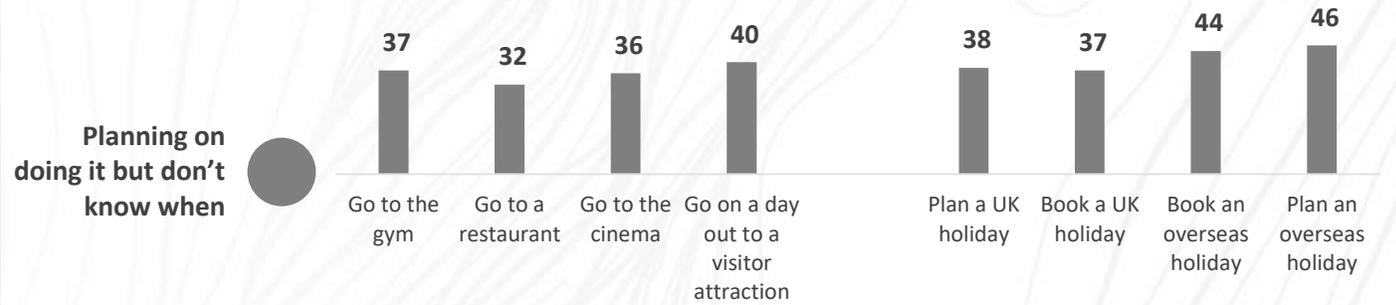


8:29 pm · 21 Mar 2020 · Hootsuite Inc.

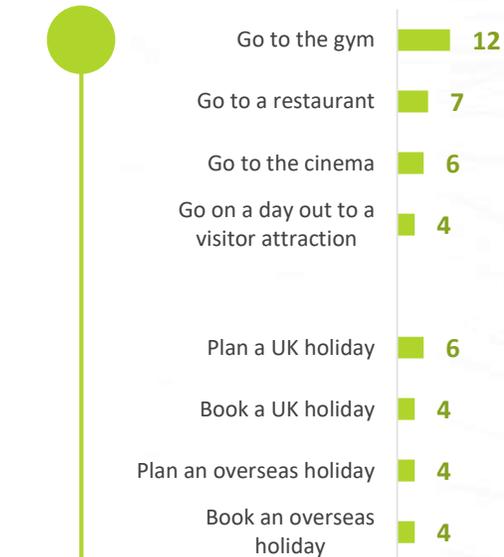
1.6K Retweets 3.6K Likes

When will consumers engage with leisure activity again?

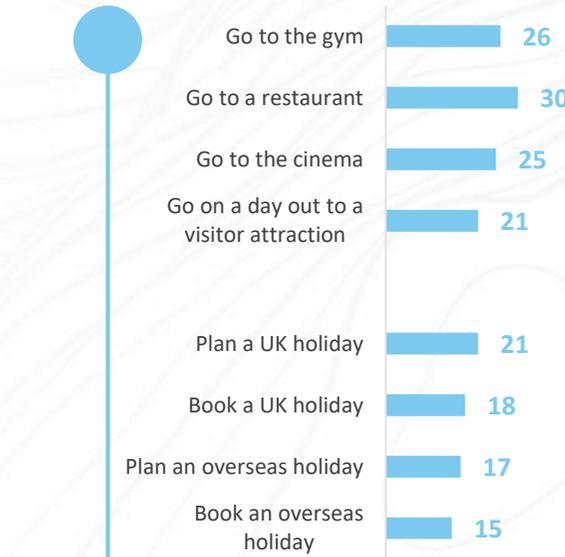
- Being confined to our homes and with most expecting the situation to get worse before it gets better, it's no surprise to see low anticipated engagement in the next month. There is a clear pick up from 3 months onwards, but the fog of uncertainty means that the plurality of consumers simply don't know when they will engage with the leisure sector again.
- 1 in 8 hope to go to the gym in the next month. This may be optimistic, but it perhaps reflects the increased importance placed on increasing physical well-being and building better immune systems in the current climate.



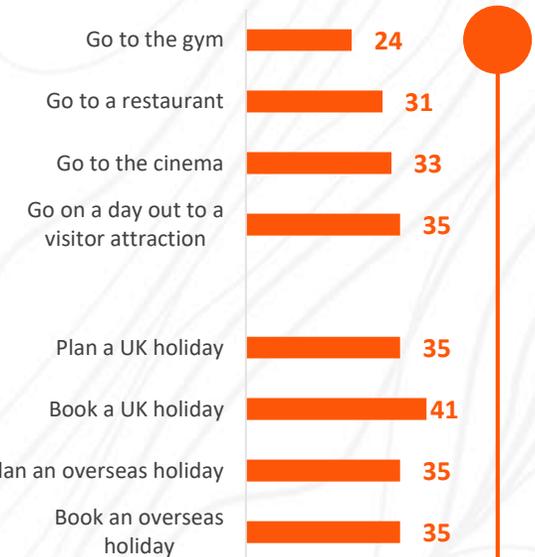
Within the next month



Within the next 3 to 6 months



Within the next 6 to 12 months



1 month 2 months 3 months 4 months 5 months 6 months 7 months 8 months 9 months 10 months 11 months 12 months

Q11. Which the following are you intending to do in the next 2 weeks

Q12. Given what you know today, when do you anticipate doing the following? Base all intending to do each activity

Visitor attractions: the word on social media this week



Visit Bath
@visitbath

Take a virtual tour of The Roman Baths and Pump Room and enjoy a bit of beautiful Bath from the comfort of your own home. > bit.ly/2vlaQod

“This is so cool!”

“It really brings back memories!”



Birmingham Museums
@BM_AG

Visit @BM_AG virtually! On this tour you can wander around our art galleries, and no one is standing in the way of your favourite painting! Have a mooch around and tell me what catches your eye - I'm sure you'll find something to love! ❤️

“Fantastic. shared to our local support group. home school trip with out having to leave the sofa win win :D”

“Just virtually wandered around in this a bit - brilliant tech! Will be returning later to revisit some #PreRaphaelite favourites from @BM_AG's magnificent Victorian collections.”

Social media conversations have applauded the virtual tours some attractions are now providing to their audiences



British Museum
@britishmuseum

Did you know you can #MuseumFromHome on @Google Street View?

Explore the galleries and find your favourite objects wherever you are – start a virtual visit by dropping in to Room 41 to see finds from Sutton Hoo: ow.ly/J5Es30qqZEz

“I loved it .. thank you .. kids & I enjoyed every hall”

“This is a wonderful way of seeing these items safely at home!”

“Needing a bit of inspiration for things to do at home with the kids (or without)? We've pulled together some of our favourite bits that the internet has to offer - including a virtual tour of the British Museum in London  silverswanrecruitment.com/entertaining-k... #homeschooling pic.twitter.com/BeLjM5Ukqm”

“It's fantastic when culture meet technology and vice versa”

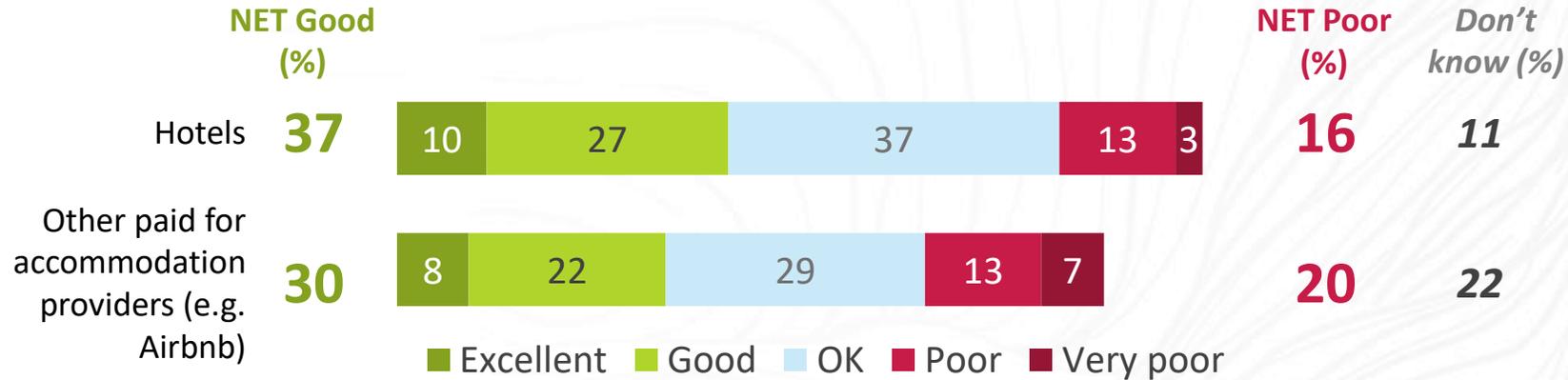
Hospitality



ALLIGATOR

Hospitality sector's response to current crisis

Q8. Overall how would you rate the response of the following sectors to the current crisis?



Hotels have been among the hardest hit businesses, and have had to maintain a positive response to the crisis while mitigating the financial damage. On the whole, more perceive them to be doing a good job than bad – boosted by positive decisions to support key NHS workers and the homeless, as well as looking after employees. However, some hotel brands have also generated negative reaction.

Q10: Are there any examples you have seen of companies in any of the hospitality sector who have responded to this situation particularly well?



“London hotels opening up for the homeless”

“AIRBNB who repaid a holiday deposit in full within five days and Marriott who have offered to amend a holiday booking without any problems”

“Marriott. Taking care to ensure that all staff have the opportunity to do some work if possible and ensuring guests are protected by having stringent cleaning done.”

Q8. The UK's leisure, travel, tourism, hotel and hospitality sectors have been severely impacted by the current crisis. Companies and organisations in these sectors have responded in different ways to the challenges they face. Overall how would you rate the response of the following to the current crisis?

Q10: Are there any examples you have seen of companies in any of the hospitality sector who have responded to this situation particularly well? You can make a comment or share a link.

On social media distinct initiatives lead to positive content



Airbnb @Airbnb · Mar 14

In response to the global disruption to travel caused by COVID-19, our Extenuating Circumstances policy now applies globally to all existing reservations with check-in dates between March 14, 2020 and April 14, 2020.

Airbnb have done the right thing!!

Fair play to @Airbnb for being flexible on their terms & conditions to help people who need to cancel due to #COVID19.



Business Insider @businessinsider · Mar 19

Marriott announces CEO Arne Sorenson's salary will be suspended for the rest of the year and senior executives' salaries will be reduced by 50% as the coronavirus ravages the hospitality industry

May we all aspire to be as great a leader as this man #marriott #leader #ceo #covid_19

This guy's magnificent. Addresses his 177,000 employees on their plan. Says COVID-19 is worse for Marriott than the Great Financial Crisis and 9/11 combined. Taking no salary and cutting all executive comp by 50% this year.

#Marriott CEO says #coronavirus is 'like nothing we've ever seen,' cuts his salary to \$0 #hospitality #biztravel #travelindustry.

On social media, excellent customer service and kind gestures from hotel companies have received significant praise – also where brands have displayed flexibility on booking terms and conspicuously looked out for the welfare of their staff and guests.



Hilton @HiltonNewsroom · Mar 16

The health and wellbeing of our guests, team members and all who visit our properties is Hilton's highest priority. Learn more below.



Hilton Honors @HiltonHonors · Mar 12

Thank you to the many guests who have reached out. Your feedback inspired us. Today, we're proud to share what we're doing to provide maximum flexibility and guest safety in response to COVID-19. ms.spr.ly/6013TjsjN

@HiltonHotels I want to thank you for making the cancellation of our trips for college as easy as possible. YOU ROCK! We are in trying times, but I recommend you both #coronavirus

@HiltonHotels just raised their of respect with me. Two night stay in #London refunded as I don't wish to travel during this outbreak. Fair play. #Covid_19 #HiltonHotels #CoronavirusOutbreak

@HiltonHotels thank you. Yours is the first email, from dozens of companies Covid19 emails I've received, that is the kindest gesture in these unprecedented time's. This amazing offer won't be cheap for you, which makes it even more amazing. #thepointsguy #hiltonhotelsboth #coronavirus

When will consumers book hotels and holidays in future?

Despite positive attitudes to the way in which the hospitality sector has responded to the crisis, the current fog of uncertainty means that most consumers think it'll be 6+ months before they next plan a holiday or book a hotel – many simply don't know yet.



Within the next month



Within the next 3 to 6 months



Within the next 6 to 12 months



1 month 2 months 3 months 4 months 5 months 6 months 7 months 8 months 9 months 10 months 11 months 12 months

Q11. Which the following are you intending to do in the next 2 weeks

Q12. Given what you know today, when do you anticipate doing the following? Base all intending to do each activity

Hotels & Hospitality: the word on social media this week

 Sky News  @SkyNews · 19 Mar
Coronavirus: Gary Neville and **Ryan Giggs** open hotels to NHS staff free of charge

How fantastic of Ryan Giggs to open up his Hotels for NHS staff

"We're about to embark upon what will be a huge crisis in our country." #ManchesterUnited legends @GNev2 and @RyanGiggs_cc speak to @BeckyCNN about offering up their hotels to health workers during #coronavirus crisis

 The Guardian  @guardian · 21 Mar
UK hotels to become **homeless** shelters under **coronavirus** plan

Wow, a Positive move in the right direction

 Best Western GB @BestWesternGB · 23 Mar
Ten Hill Place Hotel, BW Premier Collection is opening its doors for the coming weeks to hospital workers wishing to stay in comfort close to their place of work 🙏

 St Mungo's  @StMungos

Great to see @MayorofLondon make 300 hotel rooms available to people sleeping rough in #London to protect them against #COVID19.

Our outreach teams in the city are working around the clock to support people during this unprecedented crisis.

See these hotels? We will remember them because they just came to a deal to provide an initial 300 beds for rough sleepers in London during this crisis. When this is over show your appreciation by booking into one of their hotels when you travel ❤️ @IHG #Covid_19

Massive kudos to @BestWesternGB for freeing up the first of their hotels as a hospital support unit and as accommodation for NHS workers. Awesome response to the #COVID19 crisis #humbled

The generosity displayed by certain hoteliers in supporting the NHS and homeless people during a period of financial crisis for the hotels has been praised online by social media users but also major new agency providing positive nationwide coverage for the brands.

 The Grand Brighton  @GrandBrighton

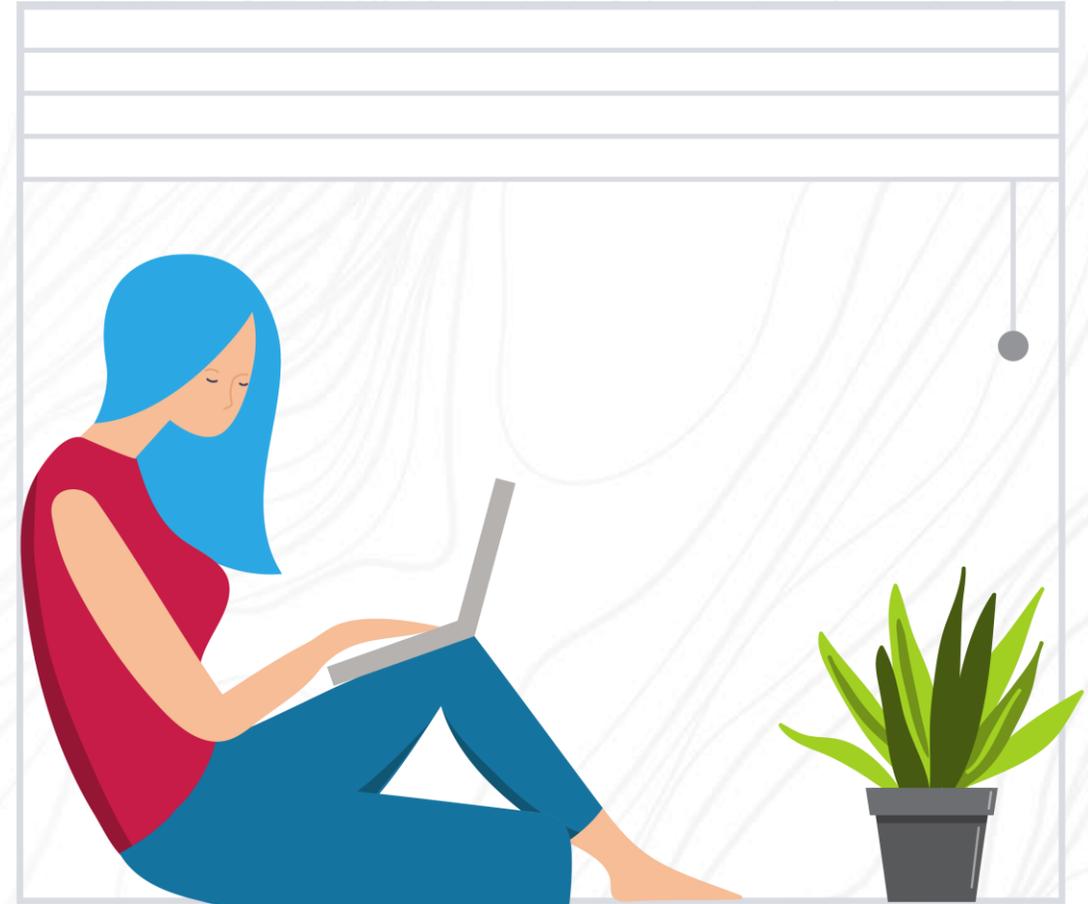
Dear friends & followers, to help prevent the spread of Coronavirus, we will be closing our doors today until further notice. Our focus now is on supporting NHS staff, helping the local Brighton community and looking after our team.

Read full statement: bit.ly/2Qpz6CA

That is awesome of you. Next time I visit Brighton it will be you who gets my custom. Thank you.

Thank you @GrandBrighton for offering your wonderful hotel for NHS staff - and crucially for your commitment to pay all your team their full wages indefinitely - that's what leadership looks like #Brighton #Coronavirus.

Transport

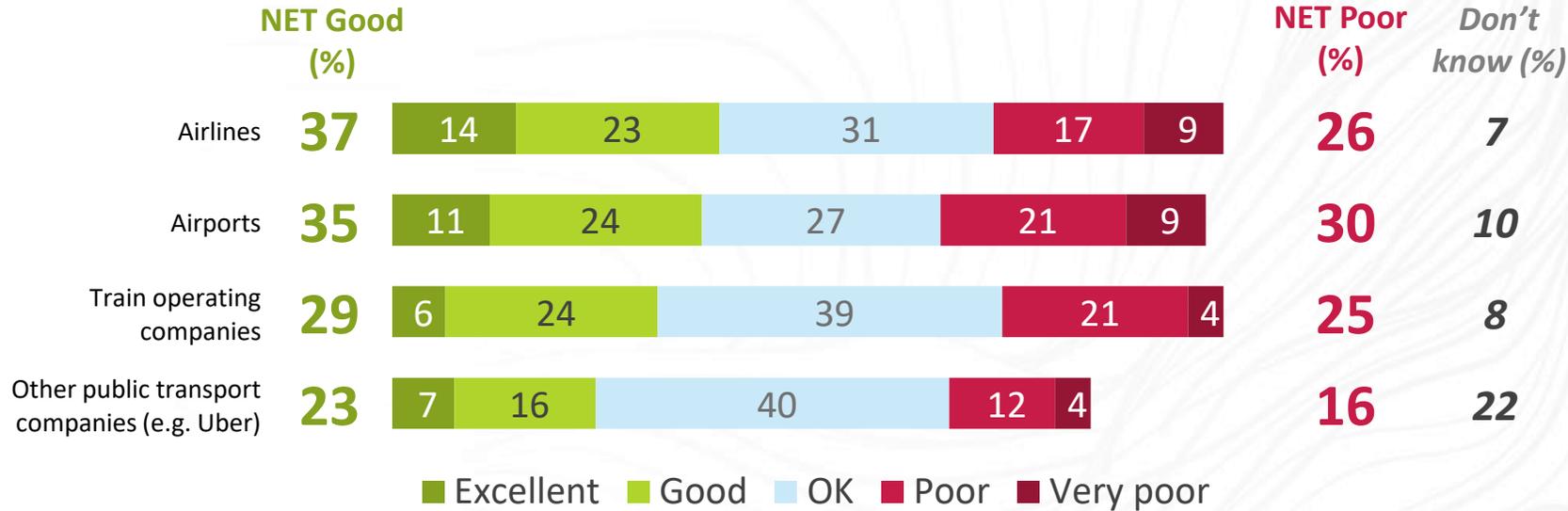


ALLIGATOR



Transport sector's response to current crisis

Q8. Overall how would you rate the response of the following sectors to the current crisis?



Across all transport sectors tracked, air travel is seen as providing the best response to the COVID-19 crisis. Respondents praise airlines for providing clear information and for taking responsibility in cancelling/restricting flights. Train operators' response is viewed as less positive following the reduction in services without controlling the numbers that then subsequently travelled – without being able to keep the social distancing.

Q10: Are there any examples you have seen of companies in any of the transport sector who have responded to this situation particularly well?

“Easyjet have kept me informed on my pre-booked flights”

“I'm impressed with Easyjet cancelling flights”

“British Airway. A flight that was booked has been cancelled and they have offered a full value voucher for another flight and this is perfectly acceptable.”

“Airlines putting on special flights to bring people home”

Q8. The UK's leisure, travel, tourism, hotel and hospitality sectors have been severely impacted by the current crisis. Companies and organisations in these sectors have responded in different ways to the challenges they face. Overall how would you rate the response of the following to the current crisis?

Q10: Are there any examples you have seen of companies in any of the **hospitality sector** who have responded to this situation particularly well? You can make a comment or share a link.

When will consumers use public transport again?

Compared with other travel sectors, consumers tend to see an earlier return to using public transport services – particularly bus services.

However, air travel intentions are much more uncertain: only 1 in 5 currently think they'll book a flight in the next 6 months – and the plurality simply don't know when it will next be.

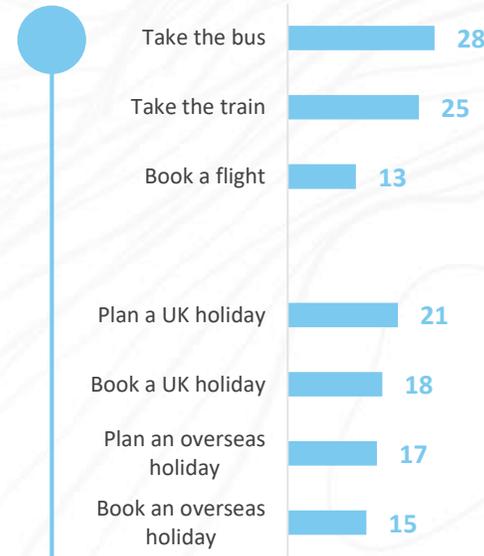
Planning on doing it but don't know when



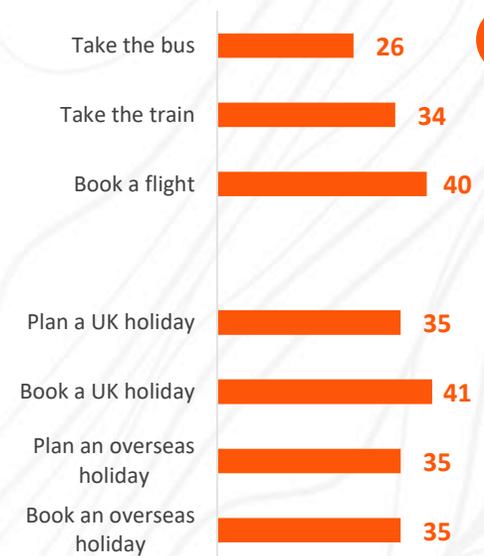
Within the next month



Within the next 3 to 6 months



Within the next 6 to 12 months



1 month 2 months 3 months 4 months 5 months 6 months 7 months 8 months 9 months 10 months 11 months 12 months

Q11. Which the following are you intending to do in the next 2 weeks

Q12. Given what you know today, when do you anticipate doing the following? Base all intending to do each activity

Transport services: the word on social media this week

"What is this rubbish @British_Airways. Get a cancellation - Try to cancel flight and all it does it offer me "Future Travel Voucher Application". I don't want a voucher, I want my points and £."

@BrittanyFerries trying to job off their long standing clients with a voucher #disappointed

"@easyJet you're telling me I can reschedule my flights for free. Coincidentally, if I try to do so, I'm getting an error. First class customer experience in times of need. Can you give me my money back please? #coronavirus #easyjetrefund"

- A large share of social media posts are around refunds for cancelled travel; typically people want a choice and not be presented with a voucher when they actually want their money back
- A lot of discussion is around the difficulties self-employed drivers face by not being able to work (and that some don't want them to work)
- In addition to better control of passenger numbers, consumers are also critical of transport staff not being provided with protective gear

"@BorisJohnson I am a self-empl. @uber driver, who's honestly self-isolating due to cough and temperature, who cannot get financial assistance because Uber Insists for a certificate, which the law says I cannot get @jeremycorbyn #covid19UK"

So this is the self employed working class. On a 6:40 train from Upton Park going to Hammersmith. If 1 person on here has the virus then that will affect others, who will take that elsewhere. Lockdown needed. @SkyNews @MetroUK #ShamblesStayatHome #COVIDIOTS #COVID19 #lockdown



"Fewer trains running means those who have to get on them are doing so in packed conditions. Absolutely crazy decision that is putting people at even more risk."

"@TfL Supply your staff with safety gear! Show you care! #COVIDIOTS"

"We don't want Uber drivers, Zero Hours, and the self employed out working spreading the virus... Because they would starve and be evicted otherwise... We need them at home self isolating.. IDS say a UBI will be a 'disincentive to work'"

"@TfL you do realise that fewer Tubes, means more crowded Tubes. Which means more risks of spreading COVID-19 #thinkofpeoplesafety #stoplookingatexcusetosavemoney"

Appendix



ALLIGATOR

Methodology

Quantitative survey

Online survey amongst people who have done two of the following since the beginning of the year (01 Jan 2020):

1. Used one of the following transport mode: plane, train or bus
2. Went on a day out to a visitor attraction
3. Stayed in paid for accommodation

The survey covers all parts of the UK and is **nationally representative** on gender, age and regions.

The questionnaire focuses on understanding people's views on the coronavirus situation and the impact it has on their engagement with the transport, leisure and hospitality sectors.

Social media

With customers increasingly communicating directly with organisations and their peers through online channels, these conversations cannot be ignored in the assessment of the COVID-19 crisis on brands.

Our social analytics tool gets closer to the conversations happening in the online space, by listening to how brands are talked about across social media and how brands' reactions to the situation is viewed online. The social media analytics cover all three sectors in the UK and rigorous content cleaning and checks are set and regularly reviewed to ensure data quality. The analysis looks at conversations around the coronavirus from 16 March 2020 to 23 March 2020.

This is a weekly survey capturing 200 respondents per wave



Similar to the quantitative survey, social media will be analysed on a weekly basis. For this report we've examined:

- 139,579 posts for the transport sector
- 43,624 posts from the leisure sector
- 73,354 posts from the hospitality sector

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