

Tracking Consumer Sentiment on the Impact of COVID-19

Travel & Mobility, Leisure & Hospitality,
Business Sentiment

Weekly Update – 23rd June 2020



ALLIGATOR



Introduction

As this report goes to press, the most significant policy announcement from the UK Government in recent weeks is being made: the 2m distancing rule is to be reduced to 1m; cinemas, museums and other indoor attractions will be able to re-open – though not yet ‘close-proximity’ venues like leisure centres, swimming pools and indoor gyms. Restaurants, pubs, hotels and other hospitality businesses can now confidently plan for re-opening from 4th July onwards.

The announcement should not be positioned as a silver bullet for a domestic hospitality and leisure sector which remains in a parlous state. However, it offers some long awaited certainty, the prospect of welcoming guests and customers again – and with it, a much needed revenue lifeline for businesses up and down the country. Ahead of today’s big announcement, we have continued to record shortening lead-times in the majority of categories – particularly in the outdoor visitor attraction sector which is now gaining significant momentum.

Looking beyond the improving domestic picture, the UK’s controversial 14-day quarantine policy is reportedly up for review on 29th June – by which time it is anticipated that we will have clarity on the role of “air bridges” in enabling holidays to a number of short-haul European destinations.


This week’s report comes with our regular monthly bulletin on business opinion. While business decision-makers remain some way behind the rest of the population in terms of their typical mood, the good news is that there has been no growth in the proportion of businesses negatively impacted by COVID-19 in the last few weeks, or in terms of the proportion of decision-makers who are worried about their company’s survival prospects.

Nevertheless, many businesses are planning on change: more than 1 in 4 office-based businesses anticipates reducing the amount of office space it currently uses – a figure which rises among larger and longer established companies. Beyond the direct impact on the commercial real estate sector, this has a series of knock-on consequences for sectors such as transportation, retail and hospitality which will need to be thoroughly investigated and understood.

Stay tuned and stay safe!



Matt Costin
Managing Director, BVA BDRC



Suzy Hassan
Managing Director, Alligator Digital

Executive Summary

Business sentiment holds steady.....but still trails the population as a whole

Just as the mood of the nation holds steady once again, so too does the mood of UK businesses. UK business decision-makers are still rather less positive than consumers and their confidence in the British government continues to edge downwards. However, since we last asked the question in May, there is no evidence of worsening in terms of the number of businesses affected by the pandemic or concerned about their survival. 1 in 4 office-based businesses intends to reduce its office space – a proportion which grows among bigger and longer established companies.

1 in 3 'Travel Activists' plan to have a day out at an attraction by end of August

A few weeks after the re-opening of many outdoor attractions, potential visitors now have greater reassurance that visits are both possible and safe. In the context of non-essential shops also re-opening, a trip to a comparatively spacious outdoor attraction may seem less daunting than it did during lockdown. These factors have increased intention to visit this summer. As this report goes to press, the UK Government has announced that museums can open from July 4th, meaning next week we are likely to see a further rise in intentions.

Lead-times for staycations continue to shorten, ahead of Government announcements

Although average lead times are dropping, they are not doing so at a rate that suggests a surge in summer staycations. There has been no significant movement in intentions to take a UK trip by August in recent weeks, suggesting that until now, there is a big chunk of the population still to be persuaded. However, as this report goes to press, the government has announced the relaxation of the 2 metre rule, allowing many hospitality businesses to re-open from 4th July onwards – therefore we can expect to see more movement in next week's report.

International holidays and flights see further shortening of lead-times

The average anticipated lead-time to next international trip (among our 'Travel Activist' sub-sample) drops by over a month since last week. While this is encouraging for the travel sector it has to be kept in perspective – only 11% of our travel activist sample is anticipating taking an international summer holiday and only 1 in 4 anticipate going away by the end of the year. The outlook for aviation, inevitably closely aligns. A review of the quarantine rule on 29th June may be key to accelerating progress.

Net increase in cycling for both commuting and personal travel

While actual consumer behaviour often differs from stated intentions, worthy of note is the consistent net increase in anticipated use of cycling – both as an option for commuting and also for personal travel. Encouragingly for the environment, there has been only fleeting evidence of a suggested shift towards car usage – and this week's report shows net anticipated car usage down for both commuting and personal usage. However, in line with advice that has been issued to date, anticipated use of bus and rail services remains significantly down, relative to the pre-COVID era.

Airlines fail to win public's backing for legal action against the UK Government

While the public has consistently shown that the 'quarantine' rule is likely to deter international travel and harm the economy, the majority also understand the rationale for the rule – moreover, a majority agree that those travelling between European Union countries should not be exempt. 28% support the legal action initiated by British Airways, Ryanair and easyJet, but 44% oppose it.

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The mood of the nation



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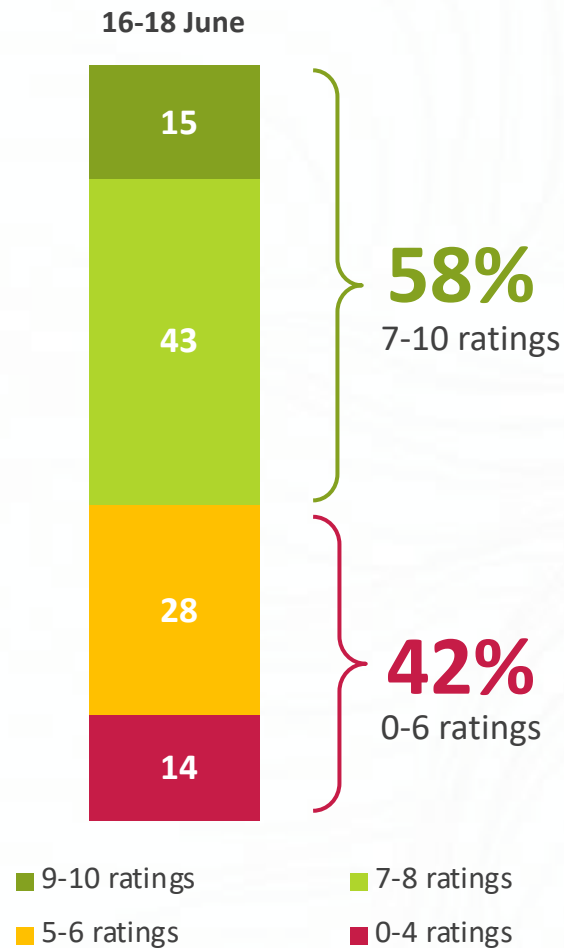


Our national mood continues to hold steady at an average of 6.6 on the 0 – 10 scale – now virtually unchanged for 2 months.

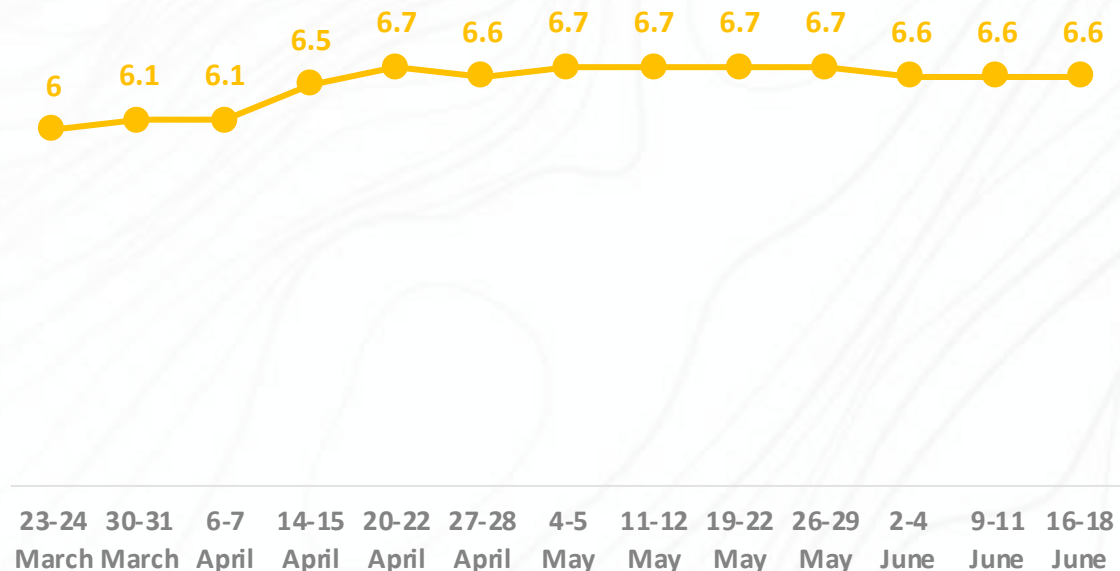


16-18 June 2020
Average mood

6.6



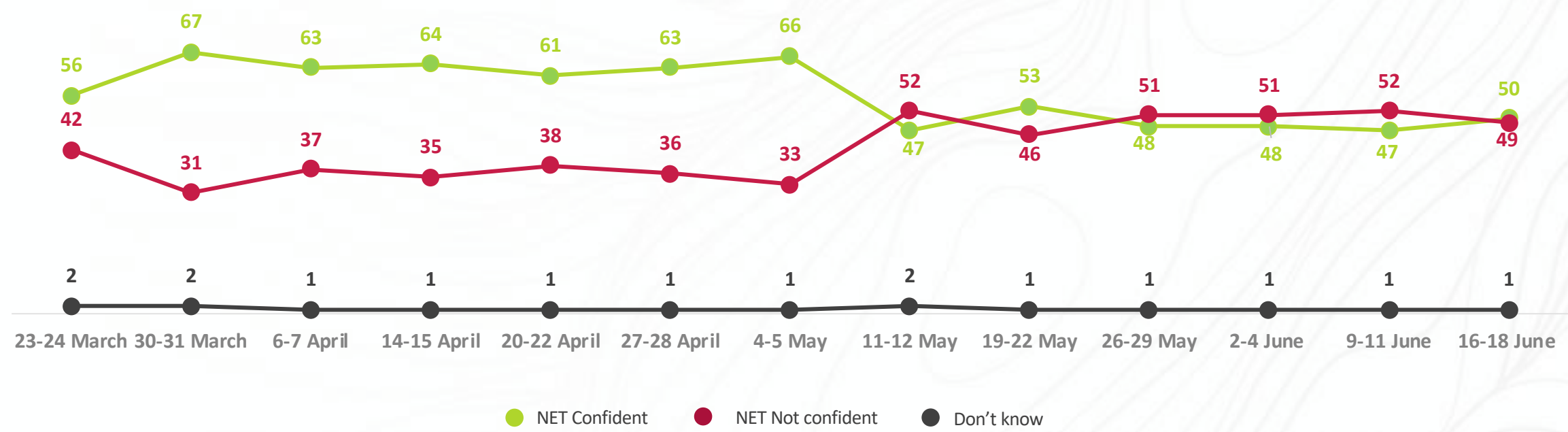
Average mood week-on-week
(UK Adults)



Perceptions of the UK Government’s handling of the crisis remain evenly split – with a 3-point swing in favour of the government since last week.

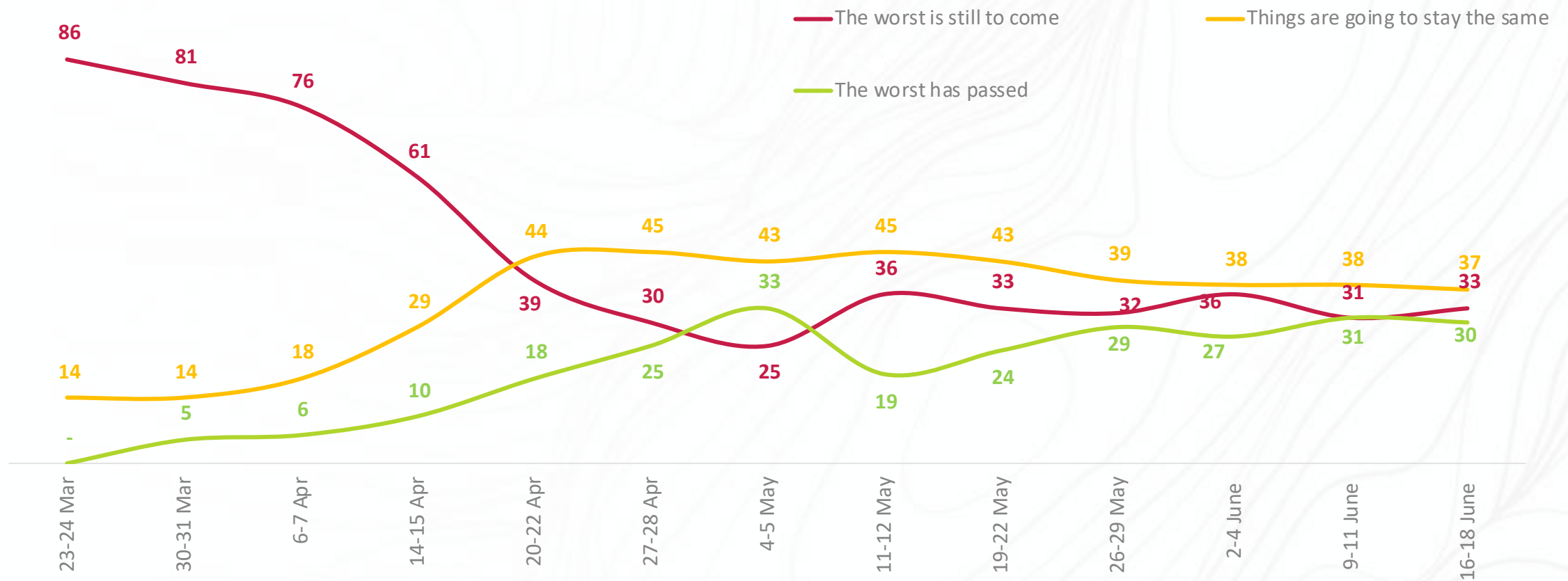


Q6: Would you say that you are completely confident, somewhat confident, not really confident, not at all confident regarding how the British government is handling the crisis? (%)



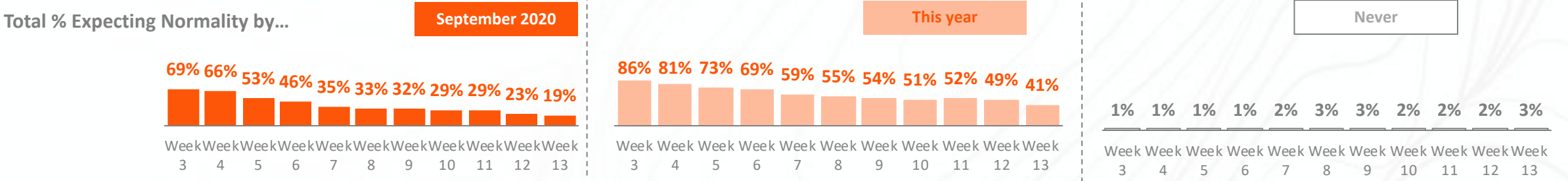
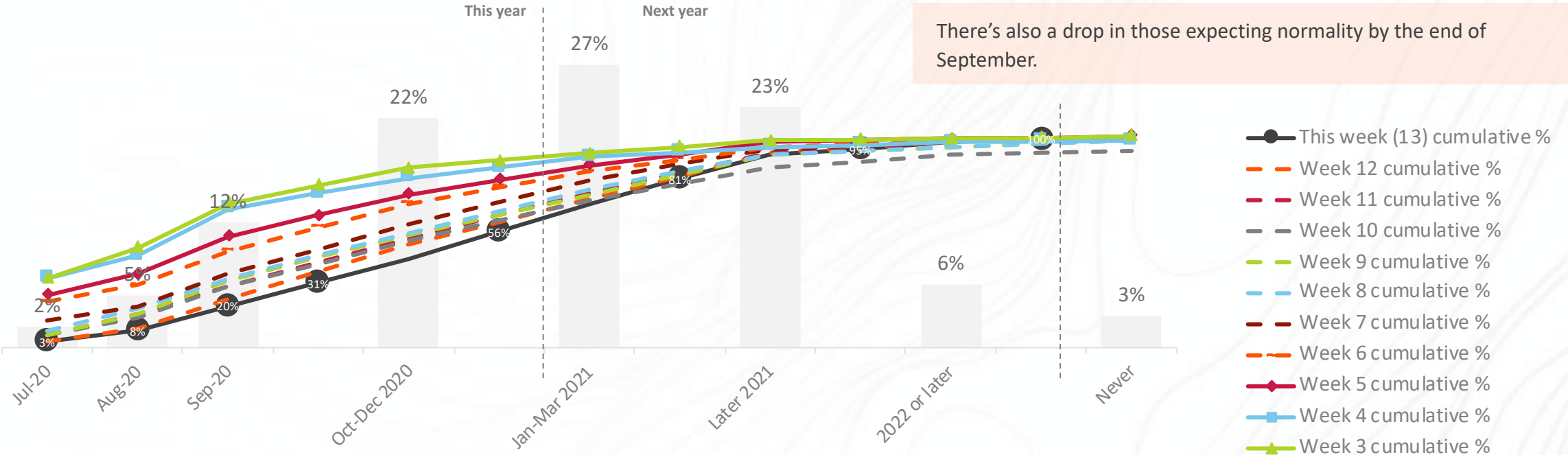
Q6: Would you say that you are completely confident, somewhat confident, not really confident, not at all confident regarding how the British government is handling the crisis? (%)

The country is also divided in its outlook for the coming month: 3 in 10 feel *the worst has passed*, marginally more feel that *the worst is still to come* while the plurality (37%) think *things will stay the same*.



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? (%)

The road back to 'normality' is becoming longer than we all envisaged: this week, only 41% think life will be back to normal by the end of 2020. 3 in 10 fear that it will be later in 2021 or beyond.



From social media this week: key themes underlying positive and negative sentiment

"Hoseasons and Cottages.com owner changes refund policy after complaints" At last some good news for thousands of holidaymakers, who should now be able to get their money back. Many more firms need to step up, or trust will forever be damaged

Improved systems

The BBC are giving away FREE Blue Peter badges to children aged between 6 and 15! The badge allows you to gain free entry to over 200 attractions across the UK including Museums and Zoos.

Supporting service continuity

Running from June 13th - August 15th, @scottishgdn will be promoting a number of fantastic virtual events and activities as part of their Scottish Summer Garden Festival!

Innovation

#LivingCoasts coastal zoo in #Torquay #Torbay CLOSING DOWN as a result of #Covid19 pandemic is incredibly SAD. Would have thought the #UK #Government could have provided enough financial support to keep @LivingCoasts open, supporting tourism in #Devon and #ocean #conservation.

Loss of service continuity

A fantastic example of agile business thinking during #Covid19 crisis. The St Moritz Hotel & Spa has revealed its plans to open the UK's first purpose-designed and built 'socially distanced' hotel restaurant.

Innovation

Riots could break out in UK this summer. Hospitality sector job cuts won't help. Sector employs 10pc of workforce, mostly young.

Failing systems

@OneTrafford and 7 others Attitudes need to change around cycling in and it is to be encouraged. I am giving it a go for the first time next week, but I won't be using it full time until I am back at work in September/October

The future

@WaltDisneyWorld unbelievable shocked with information given today regarding our 2020 holiday (been booked for over a year) covid 19 isn't your fault but it's not ours either been told it's basically tough and we need to pay more for same break in 2021 minus food! #devastated

Non customer-friendly policies

@British_Airways Everytime we see a #BA headline we hope that it's changed its policies & decided to let us have a refund for the flights it cancelled! Just because we booked them outside the #COVID19 window it shouldn't give BA the right to cancel our flights & offer a voucher!

Failing systems

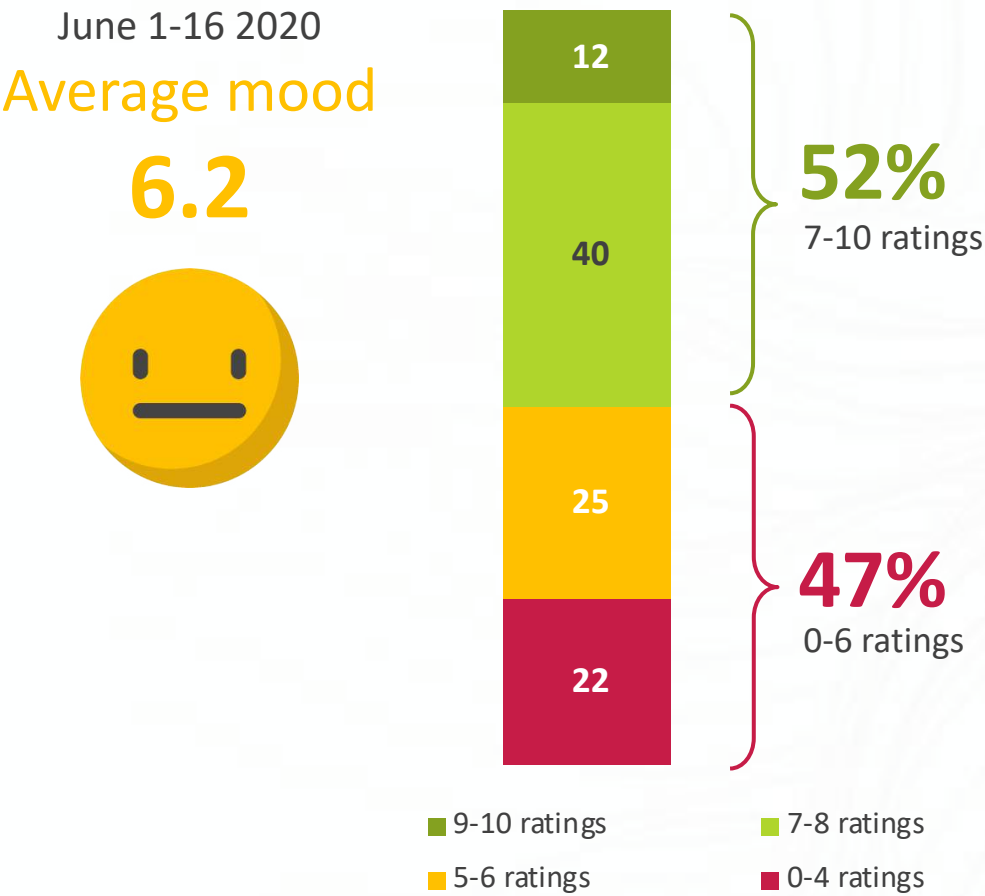
The mood of UK businesses







A comparative assessment of business sentiment collected via our Business Opinion Omnibus in the first half of June







Nationally representative online survey of 1,200 business decision makers



The mood of businesses has improved slightly in June, but remains below that of consumers



Business mood during April and May					
1-7 Apr	8-16 Apr	1-10 May	11-19 May	1-10 June	11-16 June
5.5	6.1	6.0	6.0	6.2	6.1
					

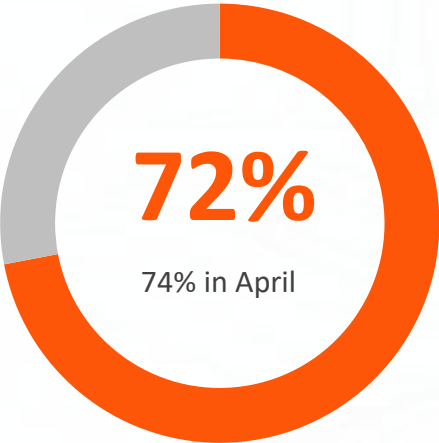
Consumer mood during April, May and June					
6-7 Apr	14-15 Apr	4-5 May	11-12 May	2-4 June	9-11 June
6.1	6.5	6.7	6.7	6.6	6.6
					

Q2: How would you rate, between 0 and 10, your mood today? (%)

Q4: 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? (%)

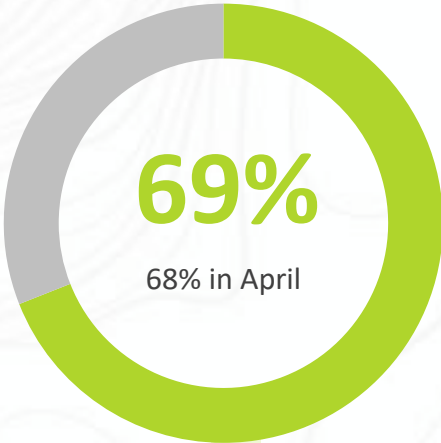
Three quarters of businesses have been impacted by Coronavirus, but 7 in 10 are confident of survival – both unchanged from April

Businesses already impacted by
Coronavirus (June)



There has been little change by most key business demographics since March

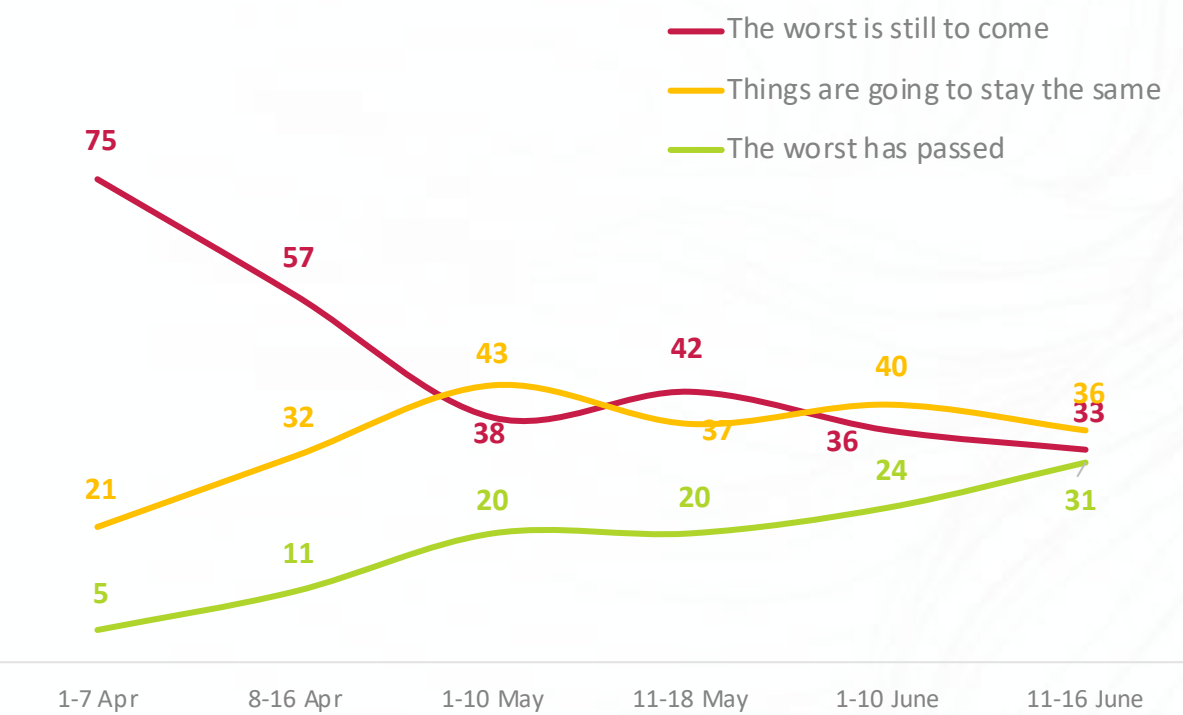
Confident in business survival
(June)



Confidence in business survival is also broadly stable by key demographics – Manufacturing and the largest businesses now the most confident in their survival (73%)

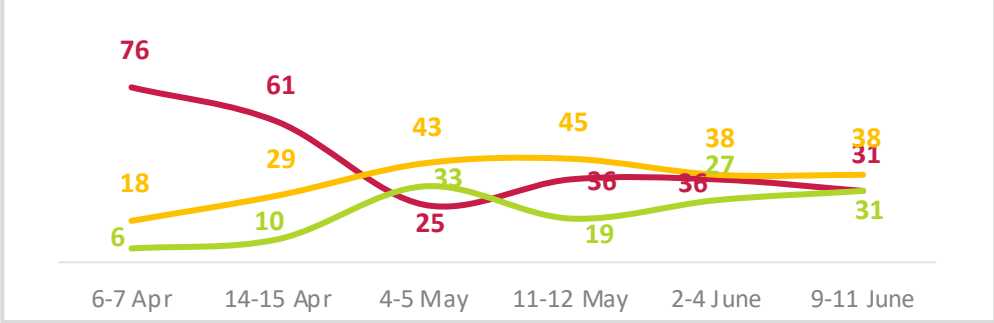
A steadily increasing proportion of businesses (now 3 in 10) think the worst is behind us, in line with consumer sentiment

Business view of the coronavirus situation (%)



- The proportion of businesses thinking the worst was still to come declined markedly across April and early May, and is now broadly stable, with a steady increase in the proportion thinking the worst is behind us, now at 31% for June as a whole
- These figures are in line with consumer sentiment for the same periods

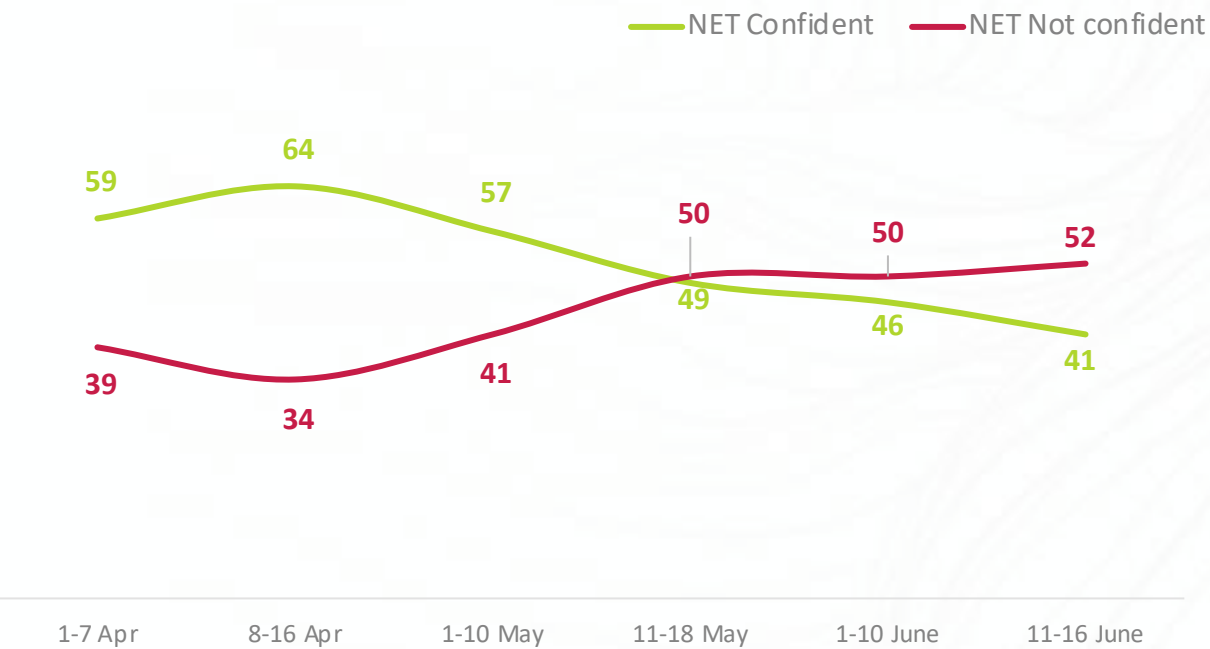
Consumer views at the equivalent points



Q4: 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? (%)

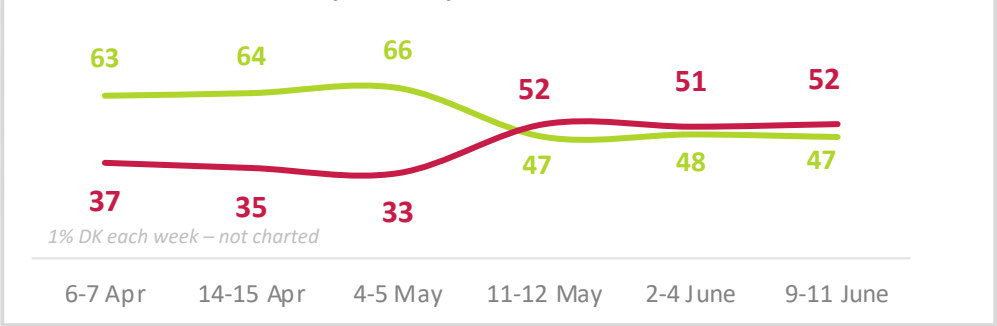
However, confidence in the Government handling of the process has continued to wane with over half now “not confident”

Business confidence in Government handling of the situation(%)



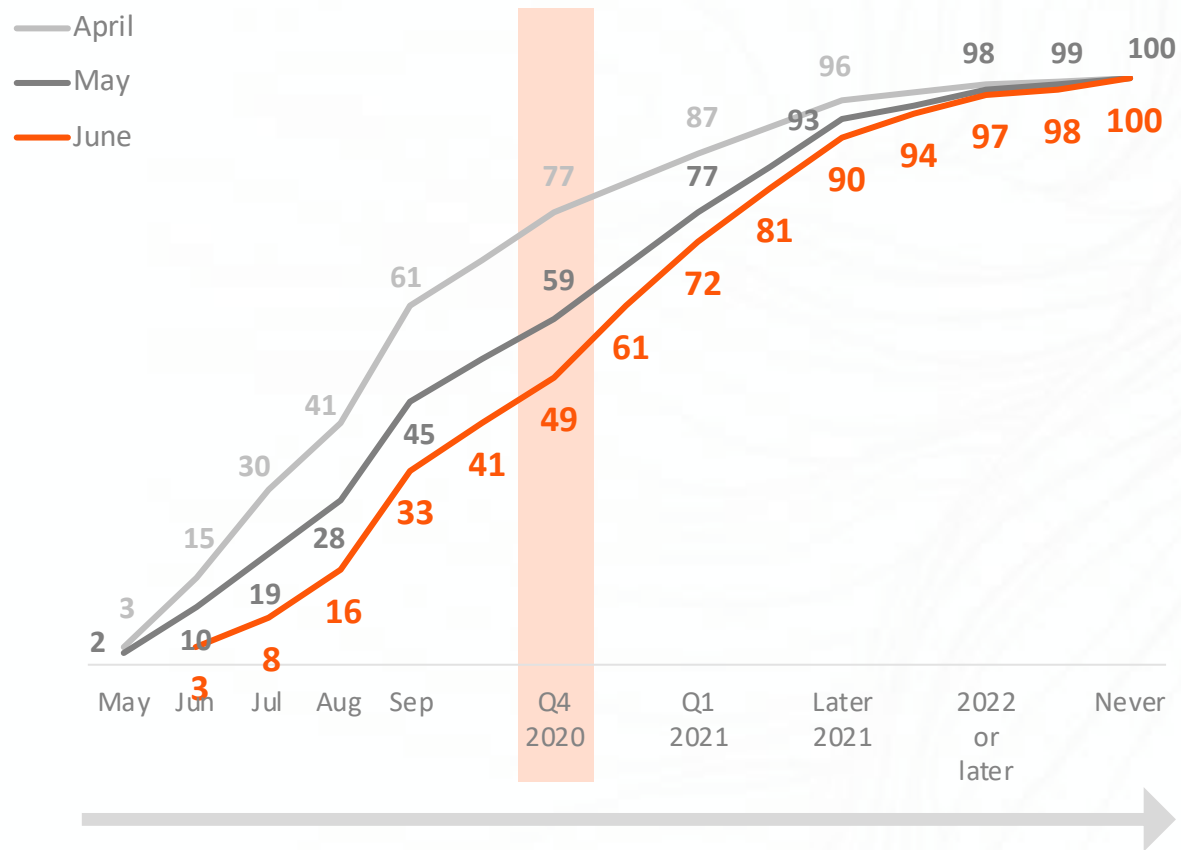
- Both consumers and businesses have shown a loss of confidence in the Government , but while consumer confidence appears to be stable, the proportion of businesses that are confident appears to be declining
- The loss of confidence in June is seen across all business demographics but most notably in the Service sector (down 22 points since April to 39% confident) and the North of England (down 24 points since April to 41%)

Consumer views at the equivalent points



The proportion thinking business will be back to 'normal' by Christmas has declined again to 49% as Retail clings on to the hope of a good Christmas

When will business get back to normal?
(Cumulative %)



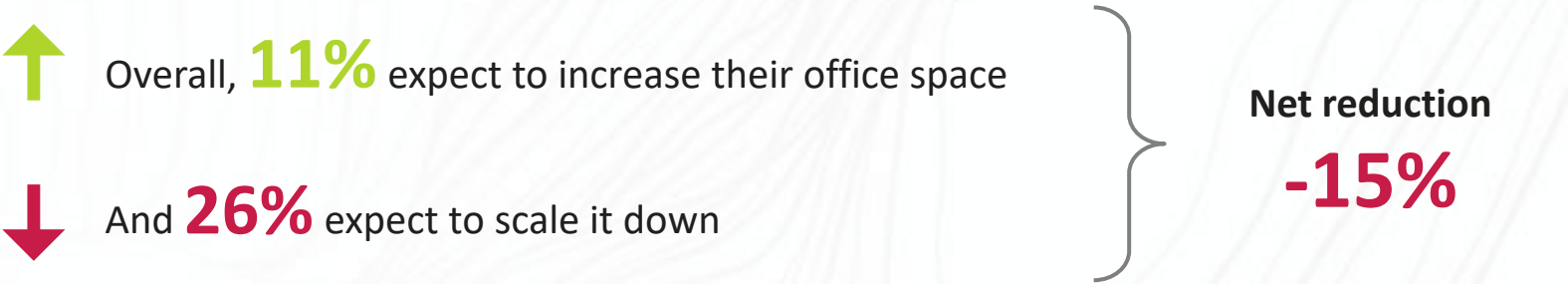
Half of businesses now think things will be “normal” by Christmas (49%). This remains closely linked to confidence in survival. 57% of those confident their business will survive think it will be “normal” by Christmas, twice as many as the 30% of those not sure their business will survive.

This proportion has dropped by an average of 26 percentage points between April and June.

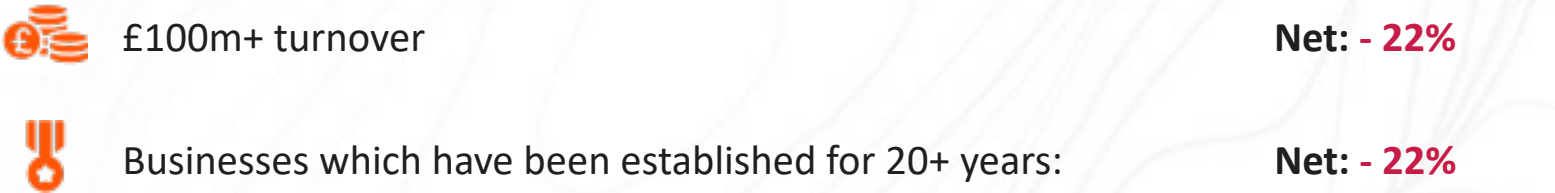
- The most optimistic that Christmas will be the new normal are:
- Those trading less than 5 yrs (59%)
 - Those in Retail (60%)

- The biggest decline in confidence is seen amongst
- Mid sized business £1-5m – from 80% in April to 46% now
 - Those in the South – 78% to 47% now
 - Those in Manufacturing – from 81% to 49% now

While most UK businesses expect no change to their office space, 26% of decision-makers expect to scale down, compared to only 11% expecting to scale up



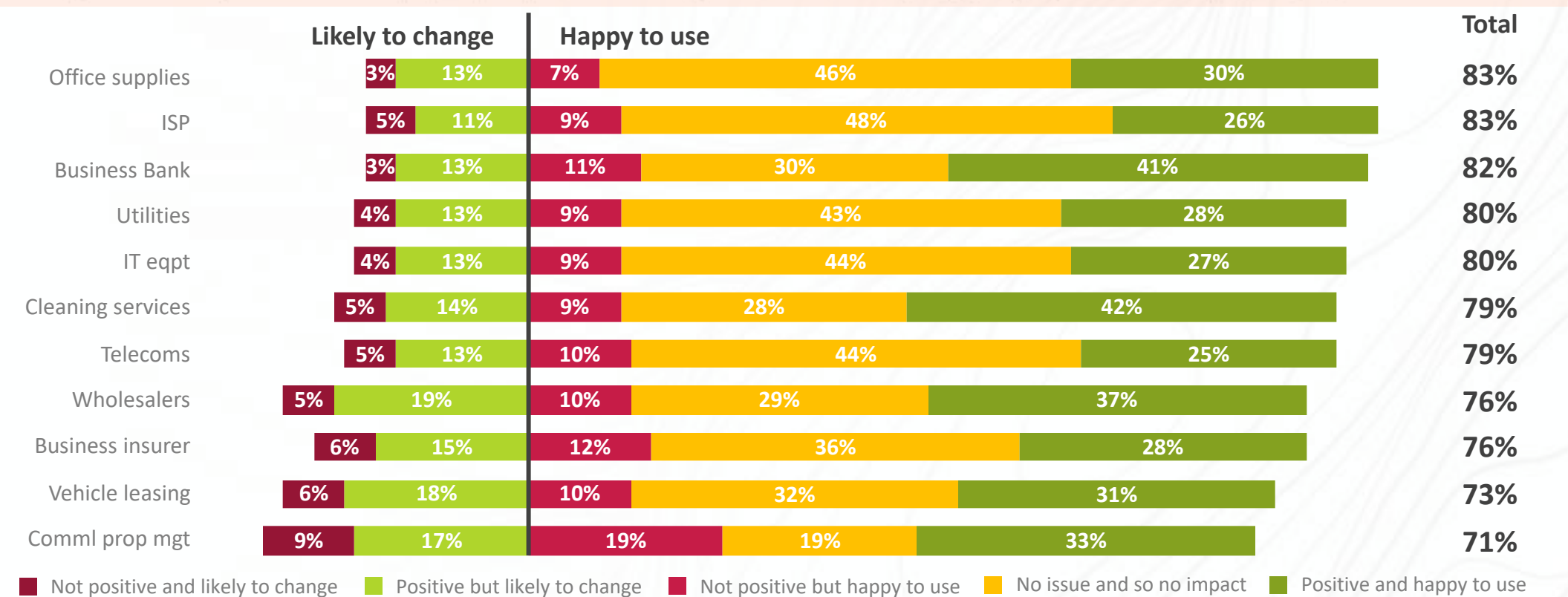
Bigger and longer established businesses are most likely to be contemplating reduction in their office space:



4 in 10 businesses have found their bank to be flexible and supportive through COVID-19 while a quarter are thinking of making changes to their commercial property or vehicle leasing

Who has cemented their relationship and who is vulnerable?

Users of each of these suppliers were asked how the relationship had changed during COVID-19. Banks (41%) and cleaning services (42%) came top for being flexible and strengthening their relationship and overall between 7 and 8 in 10 felt no change of supplier was likely, even where the support had not been all they might have wanted. Only a minority of the 1 in 4 looking to make changes to commercial property and/or vehicle leasing had been dissatisfied, suggesting regular reviews happen anyway, whatever the level of service.



Travel and leisure



On social media – On the day that the 2 metre rule has been reduced to 1 metre+, the UK population remains divided over whether it is a good idea.

“ 'PM will take charge of 2 metre rule.' So what that means England will reduce social distancing to 1 metre, even though it is still reporting highest death toll in Europe most days. Imagine voting for people who care about your existence so little. ”

“ @bankofengland Advise the government to drop the 2 metre social distancing to 1 metre. This will help the economy by enabling people to get to work, hotels open, pubs and restaurants open, cinemas. People will spend money! ”

“ @BorisJohnson There are many outdoor attractions within the UK that can safely open and maintain social distancing measures. These should be allowed to open on the 15th alongside shops. Naturally a safer environment being outdoors and added way to help get the economy moving. ”

Two-metre restriction 'could be cut to help schools and pubs reopen'

“ @fmwales Oh for Pete's sake, get the Country back on its feet and business' up and running. Down to 1 metre rule and crack on. ”

“ 684 deaths in 72 hours but hey let's reduce the 2 metre rule and go to the zoo #BorisHasFailedTheNation ”

“ @merseyrail If it's getting busier social distancing is going to be harder to do and there's nothing marked out on the trains to show 2 metre distance only 1 person will be able to sit in each seating area as there is not 2 metres between ”

One metre or two? Economic pressure stokes distancing debate

“ So shops etc have catered for 2 metre rule ready for tomorrow just for Boris to change it to 1 metre later in week... Who the hell plans all this up ”

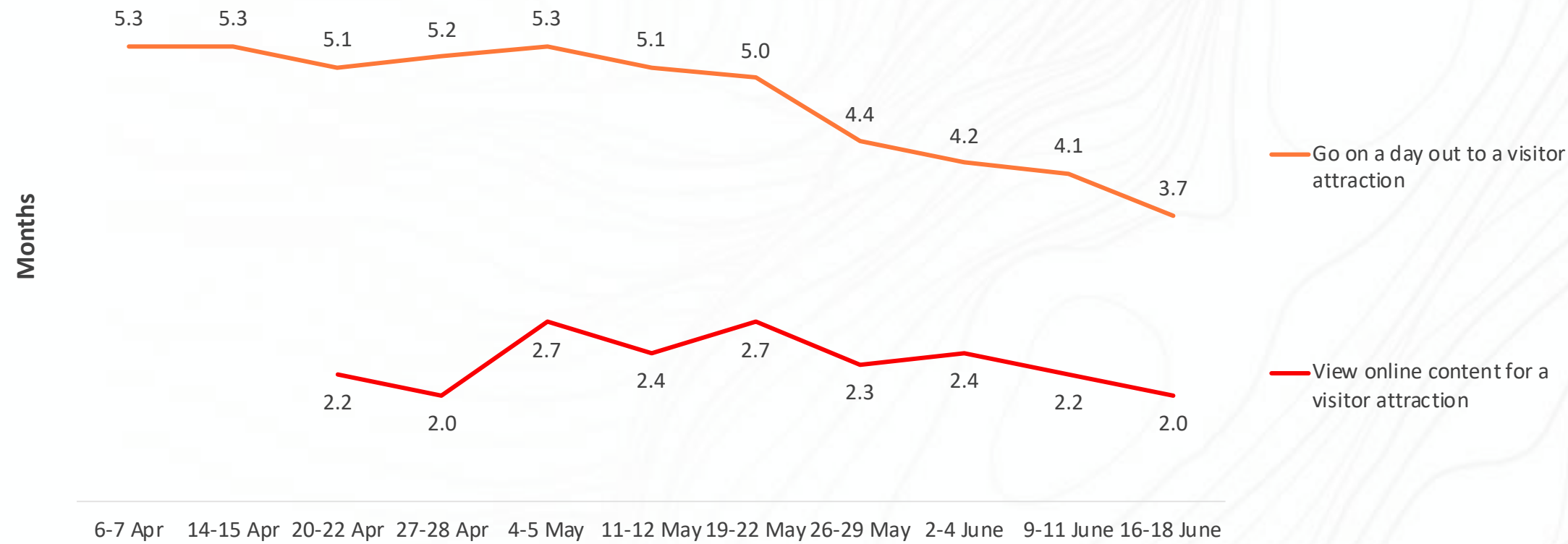
“ Scrap the 2 metre rule bring it down to 1 metre. Open the schools fully. Ridiculous you can go to shops and soon theme parks and zoos. Time to get real! ”

“ Our pubs, clubs, hotels and attractions are still closed why do we need 'travel corridors' or a lowering of the 2 metre spacing yet. Look what happened when Boris announced you could take unlimited exercise and meet up with 6 people. The next day the beaches and parks were full. ”

The lead time for going to a visitor attraction has dropped further than at any point in the last four weeks, as more venues successfully re-open



Average time before undertaking leisure activities



A third now plan on going to a visitor attraction by the end of August – the highest proportion in six waves of research



A few weeks after the re-opening of many outdoor attractions, potential attraction visitors now have proof that visits are possible and safe. In the context of non-essential shops also re-opening, a trip to a spacious visitor attraction may seem relatively less daunting than during the heart of the lockdown. Combined, these factors have increased intention to visit this summer. As this report goes to print, the government have announced that museums can open from July 4th, meaning next week we are likely to see a further rise in intentions.

Go on a day out to a visitor attraction

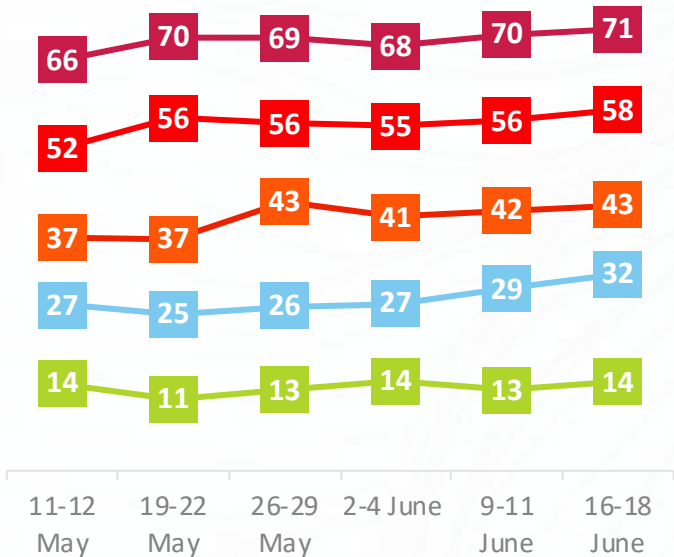
This week

3.7 months

Average time before the activity



20 24 21 22 21 21



View online content for a visitor attraction

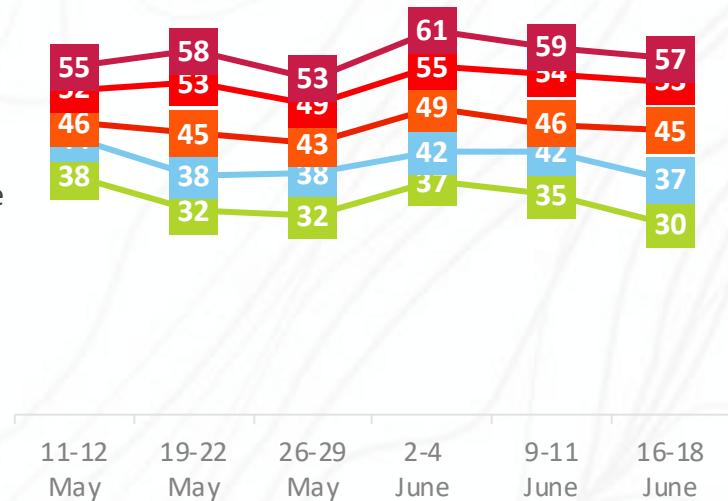
This week

2.0 months

Average time before the activity

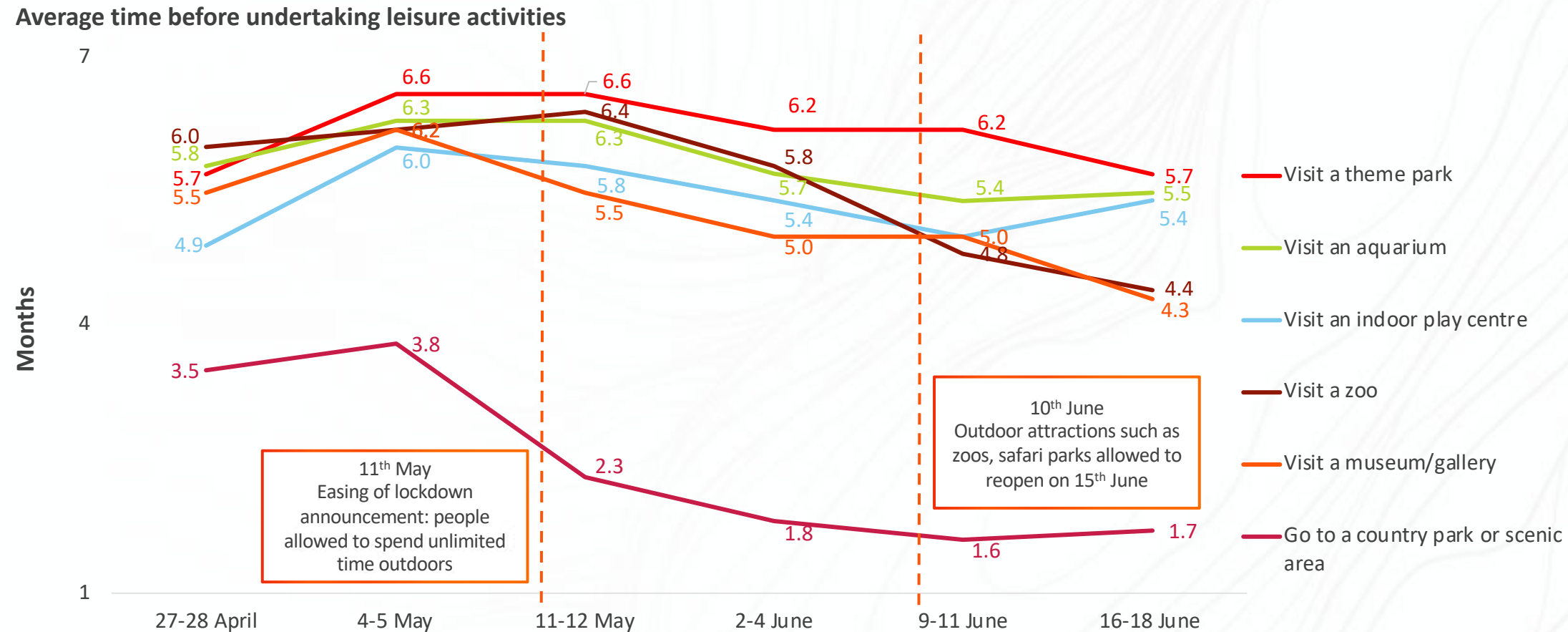


15 17 14 14 19 15



- Planning on doing it but don't know when
- By end of April 2021 or later
- By end of December 2020
- By end of September 2020
- By end of August 2020
- By end of July 2020

The average lead-time to visit a zoo continues to decline and is now at its shortest since the beginning of the crisis. Perhaps in anticipation of today's announcement, there is progress for museums, galleries and theme parks.



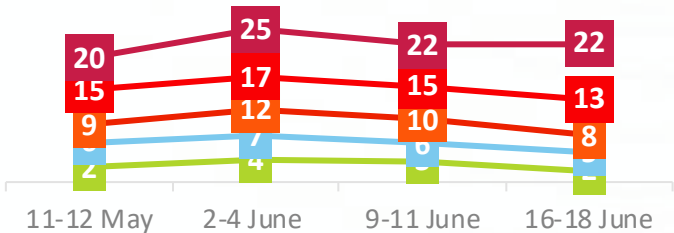
The lead time to visiting indoor attractions remains between 4 to 5 months, but this is likely to drop further next week after the announcement that these venues will be able to open from July 4th



Visit an indoor play centre



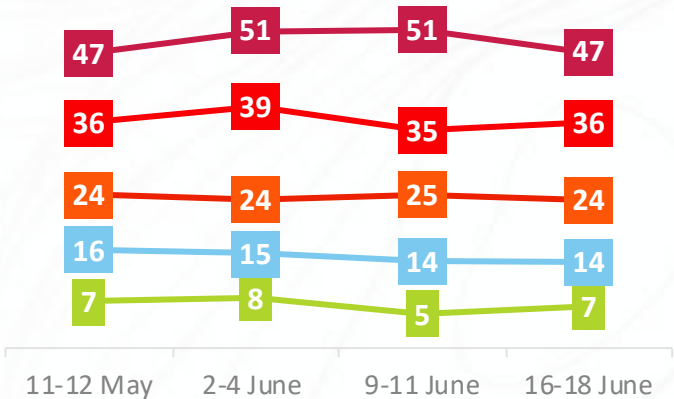
5.4 months
Average time
before the activity



Visit a museum/gallery



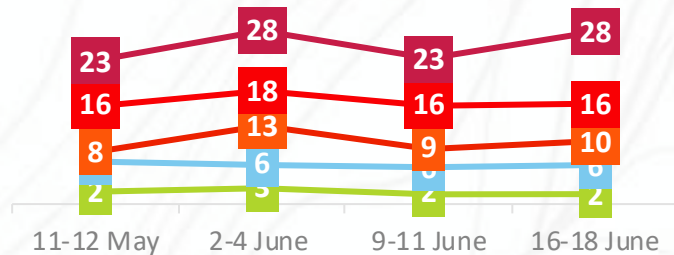
4.3 months
Average time
before the activity



Visit an aquarium



5.5 months
Average time
before the activity



- Planning on doing it but don't know when
- By end of September 2020

- By end of April 2021 or later
- By end of December 2020
- By end of August 2020
- By end of July 2020

Zoos continue to benefit from the announcement that they can open – intention to visit this summer rising for the second consecutive week

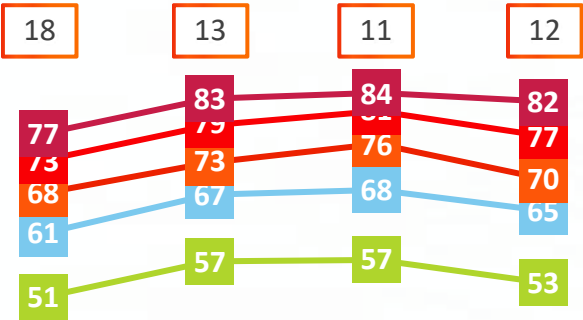


Go to a country park or scenic area



1.7 months

Average time before the activity



Visit a theme park



5.7 months

Average time before the activity



Visit a zoo



4.4 months

Average time before the activity



 Planning on doing it but don't know when
 By end of September 2020

 By end of April 2021 or later
 By end of August 2020

 By end of December 2020
 By end of July 2020

On social media – many were excited about the reopening of zoos and safari parks and felt safe with regards to social distancing measures. Some questioned the government’s priorities, and others still need reassurance about hygiene practices.

“ Chester zoo (which opened 89 years ago today) is set to reopen on 15th June saving all the animals and the jobs of the wonderful young people who work there. The fundraising for it was astonishing. A little bit of good news. ”

“ Lots of reports that zoos will be able to reopen on Monday - fantastic news. The Government can't rely on our common sense and then show none themselves! I'm pleased that they've seen sense on this one - my grandkids will be even more delighted. ”

“ Hospital waiting lists could double to 10m and millions of pupils miss 6 months schooling. Discussing on @GMB why Johnson’s trying to divert public attention by boasting zoos, safari parks and drive-in cinemas(no, me neither) will reopen... ”

Zoos reopening: What will change for visitors?

“ So happy to see that zoos and wildlife parks are able to reopen. Much easier to social distance in a huge outdoor space than in a shopping centre! ”

“ Zoos to reopen next week. Secondary schools closed till September at the earliest. #priorities ”

“ @chesterzoo Great news. Absolutely brilliant. This shows how powerful people are. Chester Zoo is part of my heritage, my growing up. A place were I took my son with my wife, when I became a parent. Chester Zoo is vast and as you have already done, made it safe encouraging social distance. ”

English zoos and safari parks to reopen from 15 June

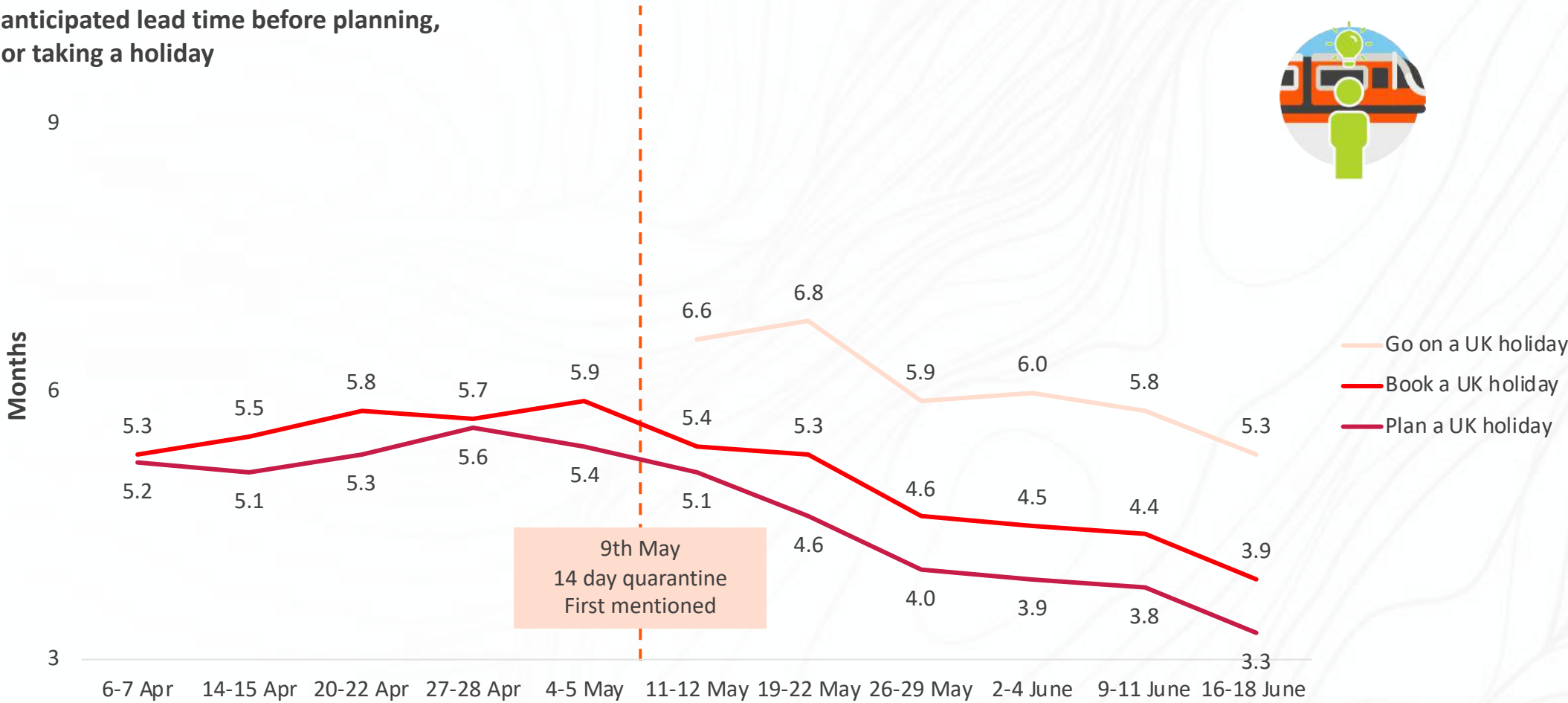
“ @Telegraph Day out for the kids as the schools aren't open but shops and zoos are. What a well run country eh? ”

“ @TwycrossZoo Fantastic news! Looking forward to bringing our little man along for his first visit to a zoo. He loves watching animals on TV - laughs his head off! Can't wait to see his reaction when we visit. ”

“ @10DowningStreet Nearest Safari Park 50 miles. Can't last all day without a loo. ”

Average lead times for going on a UK holiday have dropped for the second consecutive week - positive signs for the UK tourism industry.

Average anticipated lead time before planning, booking or taking a holiday



However, despite declining lead times, there is no evidence yet of a rush to taking summer holidays.



Although average lead times are dropping, they are not doing so at a rate that suggests a surge in summer staycations. There has been no significant movement in intentions to take a UK trip by August in recent weeks, suggesting there is a big chunk of the population still to be persuaded. As we go to print, the government has announced loosened restrictions in the hospitality sector making a UK holiday both more possible and appealing. This may herald an increase in intention next week.

Plan a UK holiday



3.3 months

Average time before the activity



Book a UK holiday



3.9 months

Average time before the activity



Go on a UK holiday



5.3 months

Average time before the activity



Planning on doing it but don't know when



By end of April 2021 or later



By end of December 2020



By end of September 2020



By end of August 2020



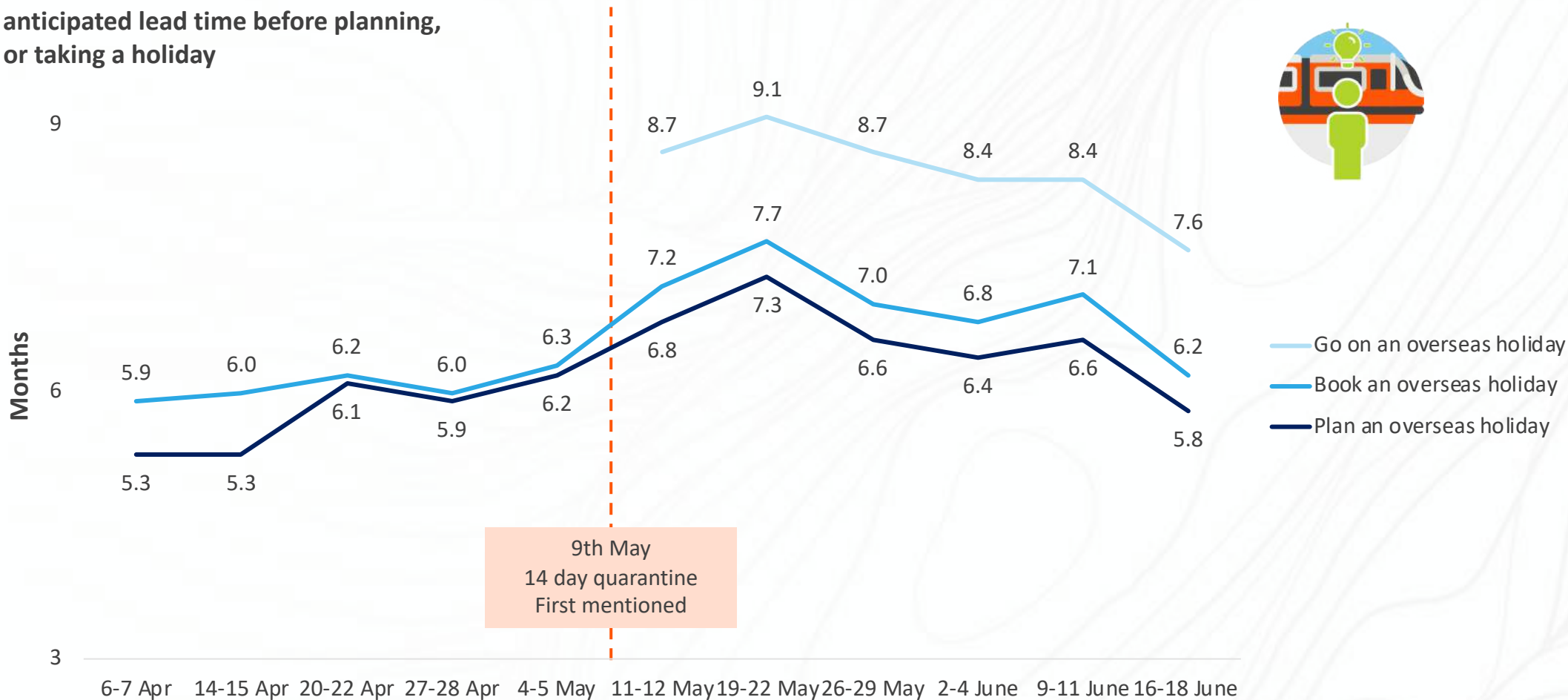
By end of July 2020

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The lead time for taking an overseas trip has dropped by almost a month compared to last week, although on average the next trip is still over 7 months away.

Average anticipated lead time before planning, booking or taking a holiday



- Go on an overseas holiday
- Book an overseas holiday
- Plan an overseas holiday

Despite dropping lead times, the proportion anticipating taking a summer overseas trip remains consistently low



Concerns around catching COVID-19, the negative perceptions of the UK’s handling of the crisis abroad, financial challenges, and the 14 day quarantine period are all likely to be contributing to very low intentions to take an overseas holiday this summer.

Plan an overseas holiday

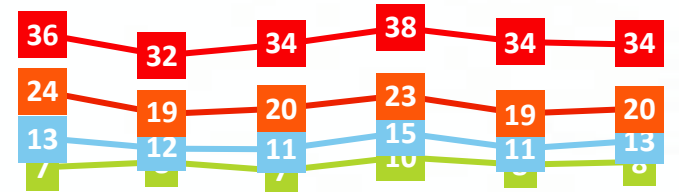


5.8 months

Average time before the activity

21 23 23 18 19 25

62 64 63 66 69 63



11-12 May 19-22 May 26-29 May 2-4 June 9-11 June 16-18 June

Planning on doing it but don't know when

By end of September 2020

Book an overseas holiday

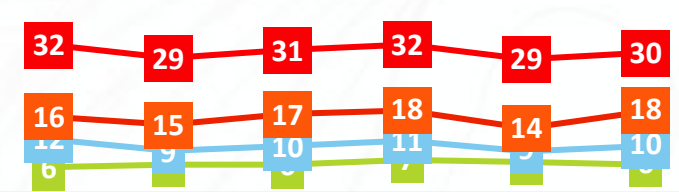


6.2 months

Average time before the activity

23 25 26 22 21 27

58 62 61 62 67 59



11-12 May 19-22 May 26-29 May 2-4 June 9-11 June 16-18 June

By end of April 2021 or later

By end of August 2020

Go on an overseas holiday

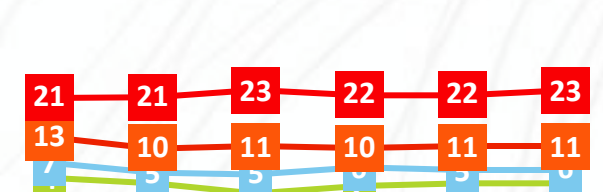


7.6 months

Average time before the activity

23 25 26 22 21 27

62 64 64 65 69 66

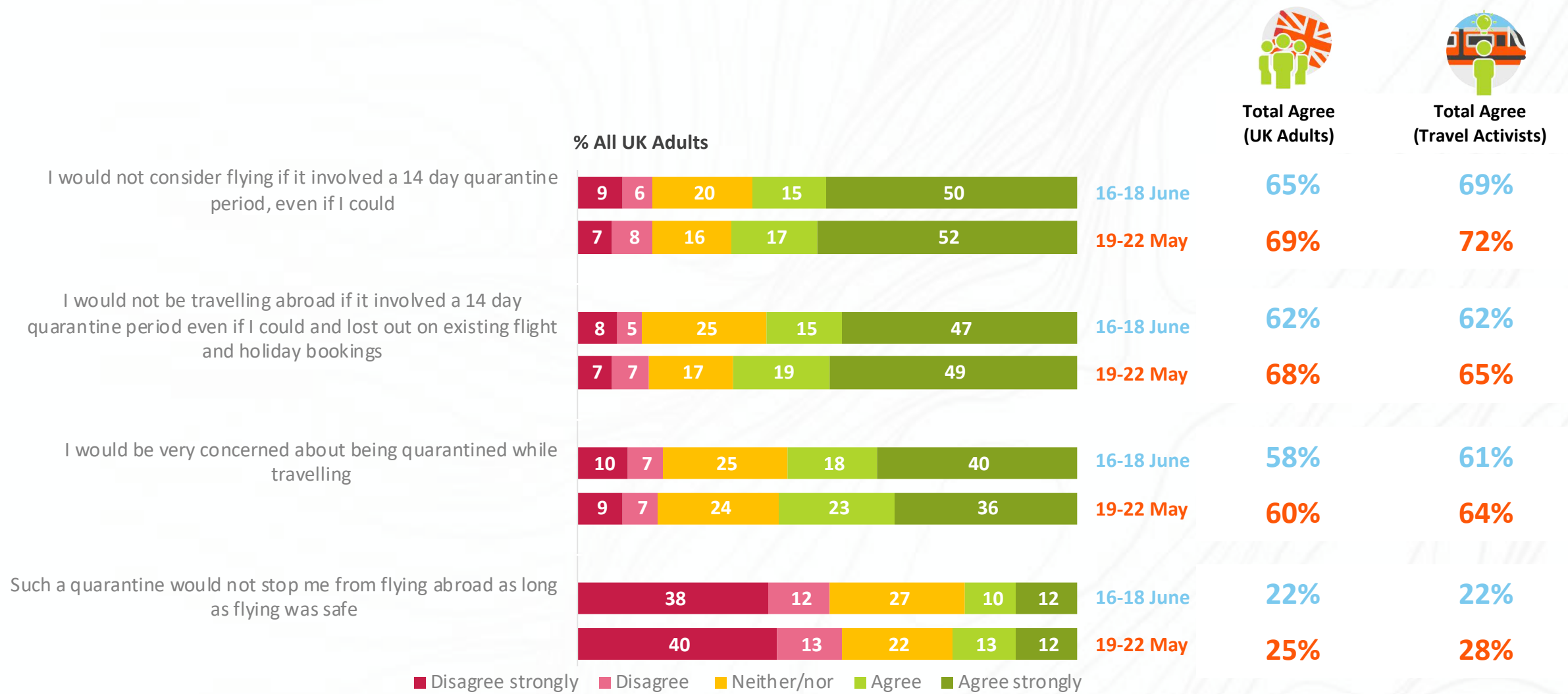


11-12 May 19-22 May 26-29 May 2-4 June 9-11 June 16-18 June

By end of December 2020

By end of July 2020

The impact of the quarantine period is evidenced by around two thirds of Britons who would not consider flying with the 14 day quarantine in place



Q61. As you may know, the government is considering plans to impose a 14 day quarantine on people arriving in the UK from abroad (with the exception of the Republic of Ireland) in response to the coronavirus pandemic. This includes those leaving the UK and wanting to return after a trip abroad. What do you think of such a plan? Base all

On social media – the public are confused about the timing of the 14 day quarantine period, many suggesting it should've been implemented months ago.

“ best email from management ever! due to our hard work during the last few months they have enhanced our sick pay to be able to pay all staff full pay for the 14 day quarantine period should we want to go on holiday this year 🙌 ”

“ I will be absolutely clear on my position. In my opinion the borders should stay pretty tightly controlled until next spring. Certainly with quarantine restrictions on return until then. That is to avoid the likely second wave in autumn/ winter that NHS managers in the UK expect ”

“ Still can't believe when I flew home in the peak of a world pandemic after being at 2 airports there was like 2 guys on the borders control, no 14 day quarantine enforced, and no temperature checks on entry Face with tears of joy UKs a joke lol ”

UK Travel Quarantine Has Come Into Force – Here Are The Rules

“ Lockdown start date: 23 March 🗑️
Travel quarantine measures start date: 8 June ✈️ If the Government knew the UK was vulnerable as a global transport hub, why did it take two months to implement #coronavirus quarantine measures? ”

“ The number of #Covid19UK deaths are at similar levels to Italy and France Those countries are open here we are still shut with a 14 day quarantine on arrival and mandatory face coverings on public transport and school still shut why ? ”

UK makes 14-day quarantine rule mandatory for new visitors

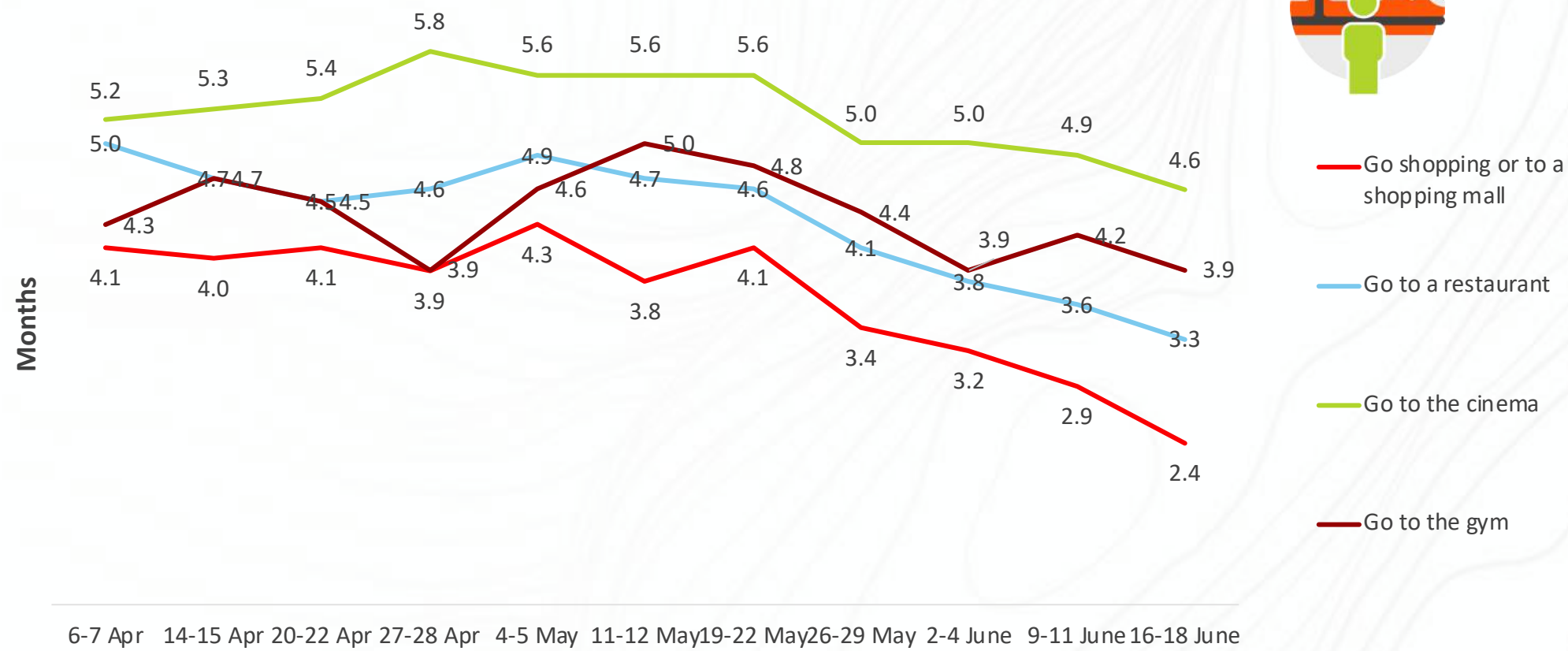
“ As the UK starts to open up globally as well as domestically, I support the 14 day Quarantine on international arrivals. This article makes great reading when considering whether you are for or against these measures !! ”

“ Can anyone explain why when the virus was at its global peak we had no checks on anyone entering the U.K. & now it's gone from everywhere except the U.K. we're instigating a 14 day quarantine for new arrivals? ”

“ The farce of the quarantine rules for new arrivals to the UK - no tests at airports, temperature not taken, no check that address is correct, people can go to shops. What if people use taxis & public transport? Why were restrictions not introduced earlier? ”

The lead time for going shopping has dropped by nearly two months since the same time in May – highlighting the impact of loosening restrictions in this area

Average time before undertaking leisure activities



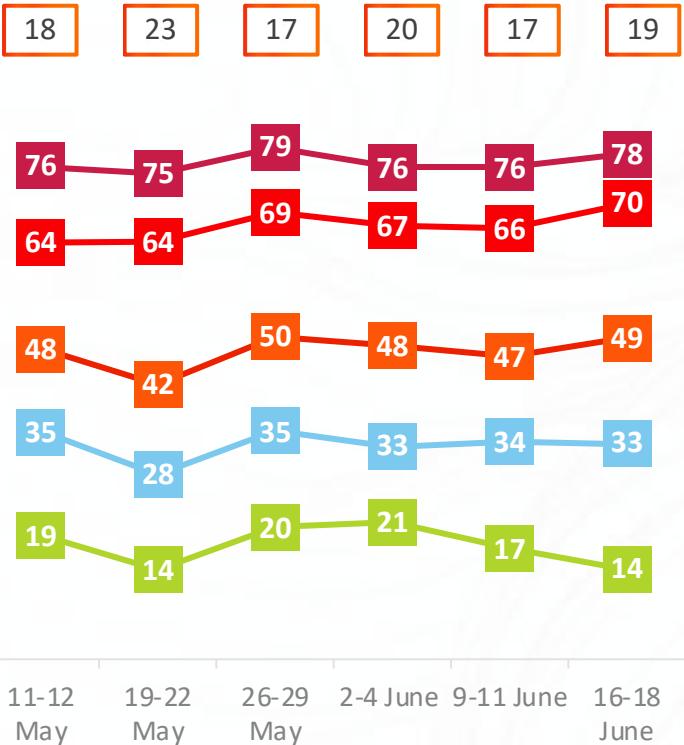
Intention to go shopping by the end of August is now at its highest in the last six weeks – near-term restaurant visits are a declining prospect



Linked to the re-opening of non-essential shops last week, the intention go shopping in the near-term is at its highest in the last six weeks of research. Intention to visit restaurants however, remains low, particularly in the next month. With the government announcing a reduction of the 2 metre rule and that restaurants can re-open from July 4th, we are likely to see an increase in optimism to visit restaurants in next week’s research.

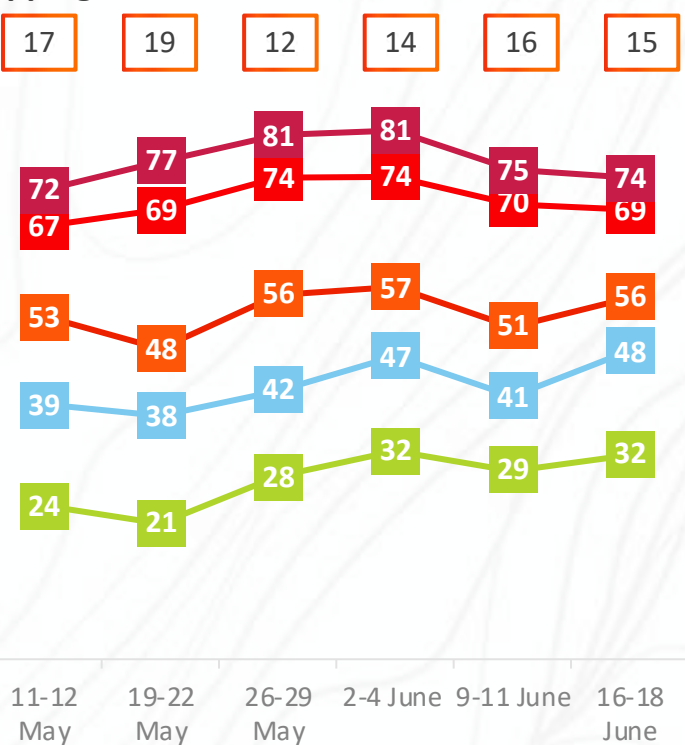
Go to a restaurant

This week
3.3 months
Average time before the activity



Go shopping or to a shopping mall

This week
2.4 months
Average time before the activity



- Planning on doing it but don't know when
- By end of April 2021 or later
- By end of December 2020
- By end of September 2020
- By end of August 2020
- By end of July 2020

Anticipated lead-times for returning to the gym remain at around 4 months – cinemas at 4.5 months



With the announcement that cinemas can re-open from July 4th, but that gyms cannot, we may see a reversal in lead times in the coming weeks.

Go to the gym



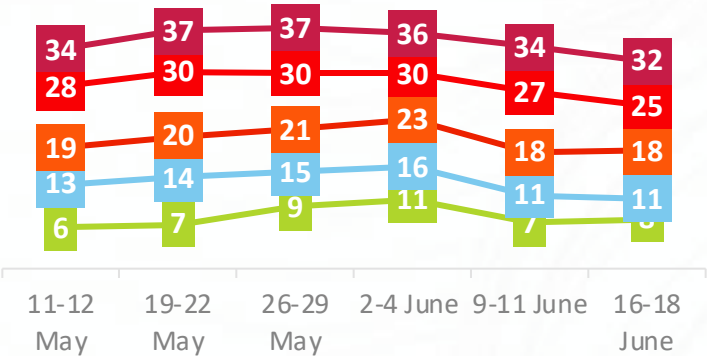
Go to the cinema



This week

3.9 months

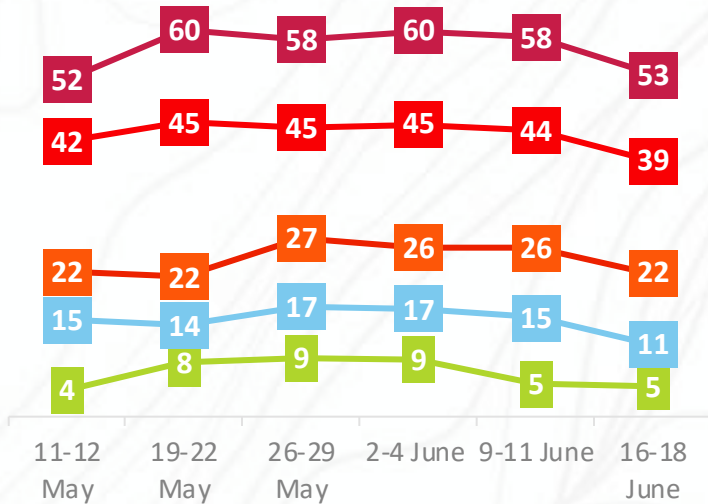
Average time before the activity



This week

4.6 months

Average time before the activity



- Planning on doing it but don't know when
- By end of April 2021 or later
- By end of December 2020
- By end of September 2020
- By end of August 2020
- By end of July 2020

When do travellers expect to book hotel accommodation again?



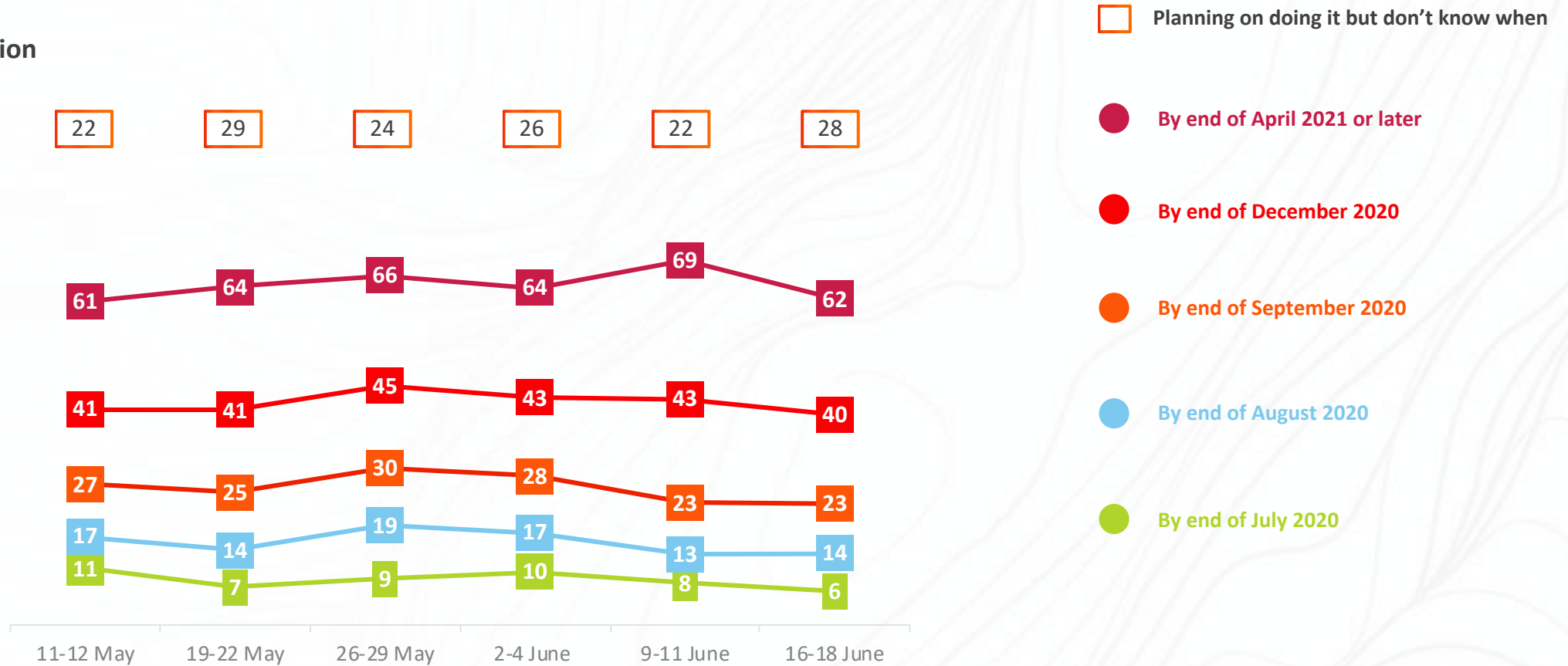
With the hospitality sector still in limbo regarding its permitted re-opening at the time of fieldwork, it's hardly surprising to see no evidence of expectations ramping up as weeks pass. In fact, as deadlines approach, proportions gradually creep downwards. This is likely to continue until such time as opening dates are confirmed and approach.

Book hotel accommodation

This week

5.0 months

Average time before the activity



On social media – With hotels planning to re-open, the public is questioning the impact of the 2-metre social distancing rule. Hygiene and health related protection measures are reassuring, however concerns about prior cleanliness have been made apparent.

“ @piersmorgan just wondered if we are still applying the 2 metre rule in UK in August and my holiday goes ahead. How does that work when I will be sharing a hotel room with 2 of my friends ? Tight squeeze at the best of times! ”

“ So that’s the 2 metre rule firmly in place in Wales for the foreseeable. It was nice knowing you pubs, hotels, restaurants. #bbcqt ”

“ The 2 metre rule is now only a guideline. The government is being sued for its illegal lockdown. Before you ruin your beautiful hotels by adhering to rules that are not law, please bear this in mind. Hotels such as yours need to remain traditional and just as they’ve always been ”

“ This has to be a joke right? Hotels couldn’t clean rooms before #COVID19 so how the hell are they gonna be clean After? Cleaners are given no time at all to clean properly, we’ve all seen the filth under ultraviolet like the toilets, remote controls carpets curtains #publichealth ”

“ Keep seeing ads from chain food places & hotels extolling their cleanliness. So you weren’t before? I don’t find it reassuring to be told that “now” you are deep cleaning...everything ”

“ Had been thinking the same about the conditions under which hotels would reopen, which didn't sound completely leisurely. 2 metre / 1 metre is a distraction from some seriously complex political and economic challenges ahead. ”

Hotels gearing up to welcome back guests - but stays won't be the same

“ Hotels that used to compete over prices and perks are now competing over hygiene, thanks to the #coronavirus pandemic ”

“ I have heard hotels in UK may do a health check form before arrival. ”

“ #AskUniversal Visiting in October from the UK (hopefully Crossed fingers) We will be staying at Endless Summer. Do hotel guests get guaranteed entry to the parks. Also, will we have to have temperature checks twice, as having one at hotel. ”

“ Clean and sanitise them? What were hotel cleaners doing before? ”

On social media – News of a potential halt of the breakfast buffet offering in hotels hasn't been well received, as many regard it as a highlight of their stay.

IS COVID-19 BRINGING THE END TO HOTEL BREAKFAST BUFFETS?

“ Interesting post about hotels opening for leisure. I wonder what effect this will have on the cost of rooms. The pool and buffet breakfast were some of the best bits of staying away for me. ”

“ I've just heard that #coronavirus might have killed the hotel buffet breakfast. I am actually distraught. How am I supposed to a) know what I want without looking at it? it's too early for that kind of decision & b) steal enough food for lunch if I have to ask the waiter for it? ”

“ I travel as a hobby, buffet breakfast included is almost always a must when booking into hotels, eat absolutely loads in the morning and saves me loads of cash on food during the day. over the course of a 10 day trip, it saves me bundles. ”

“ I actually had an anxiety/heartbreak dream about the loss of the hotel buffet breakfast after this was mooted in the UK. ”

“ Hotels now won't have a buffet for breakfast. ”

“ Omg if there's no breakfast buffet what is the point of even staying in a hotel ”

“ The breakfast buffet? Gone. Good #PublicHealth action ”

“ Bye-bye, buffets. Hello, plexiglass. How coronavirus is changing hotels. ”

Hotel confident people will still want breakfast buffets

Transport

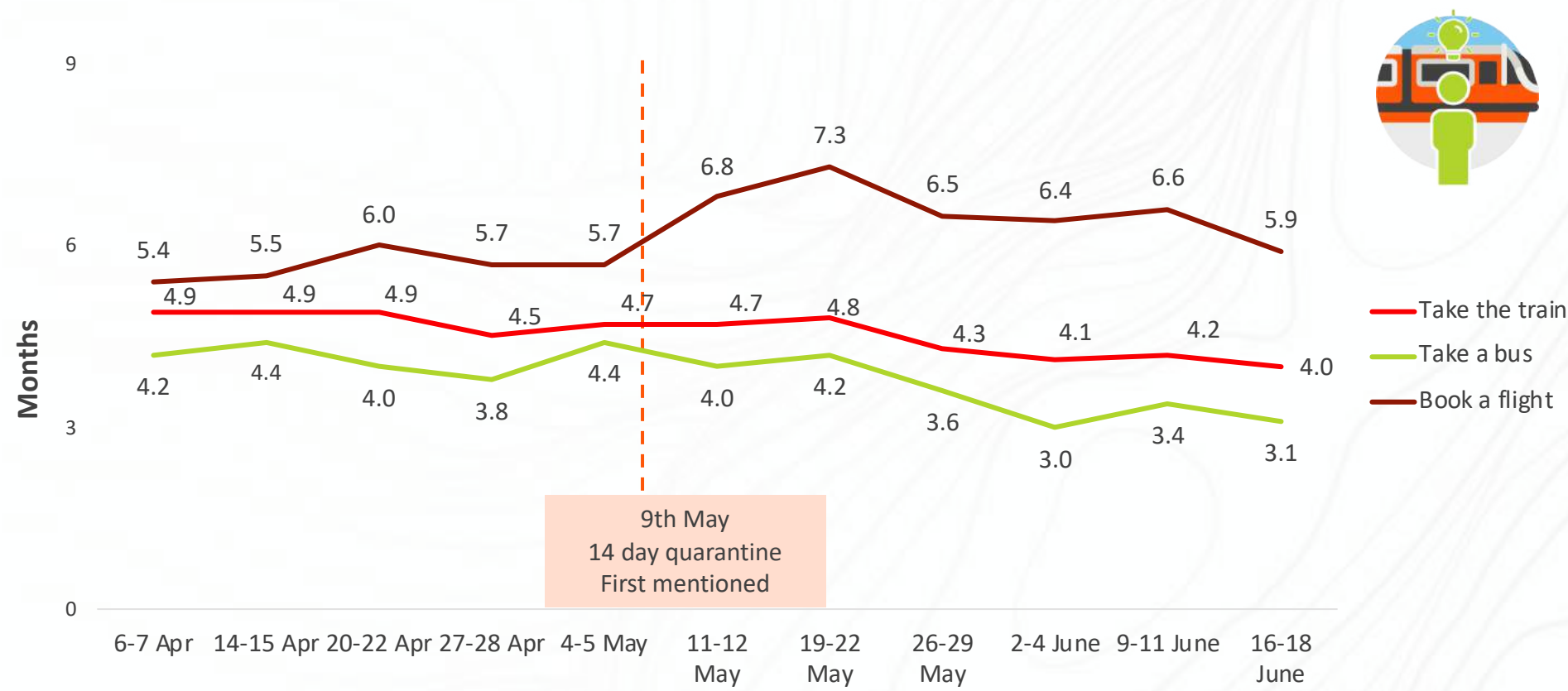


ALLIGATOR



With news about ‘air bridges’ and airlines gradually resuming their services, intentions of booking flights improve, lead times being the lowest in the last month and a half

Average time before taking the bus, train and booking a fight



Despite the decreasing lead times, the intentions of booking are still not immediate and there is growing uncertainty regarding when to book

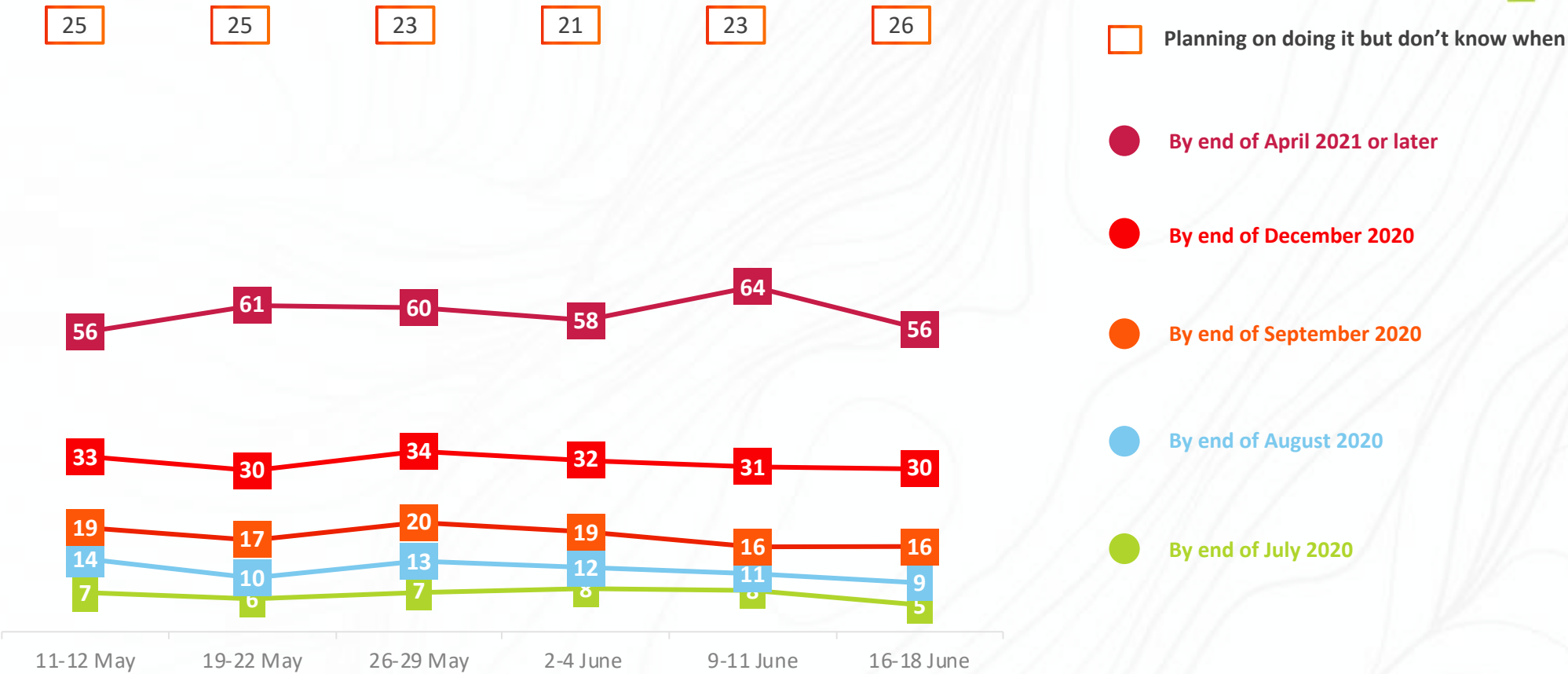


Book a flight

This week

5.9 months

Average time before the activity



Lead times for both taking the bus and train slightly decrease to a similar level to two weeks ago



Plan on taking the bus and train remain generally steady, however, less people expect to be using public transport by the end of September.

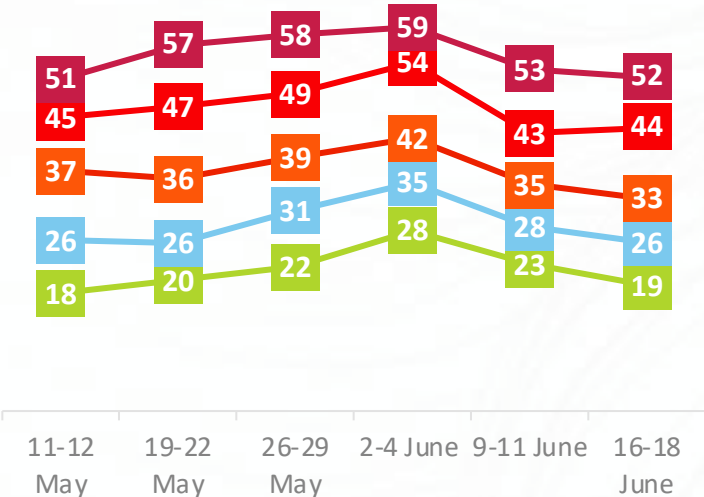
Take the bus



This week

3.1 months

Average time before the activity



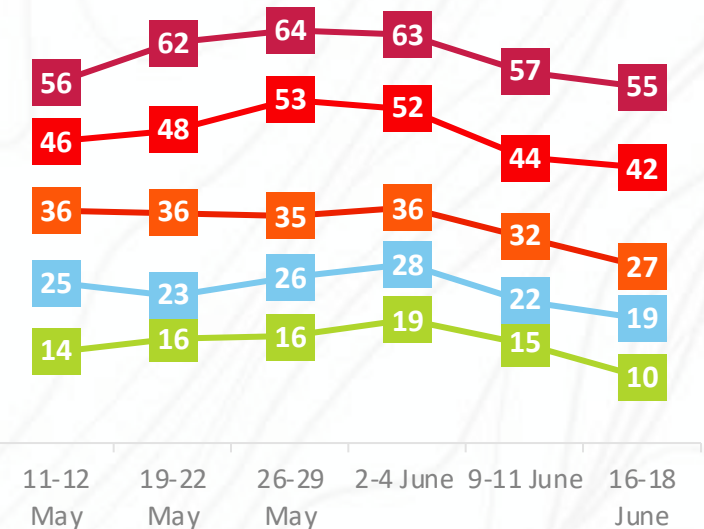
Take the train



This week

4.0 months

Average time before the activity

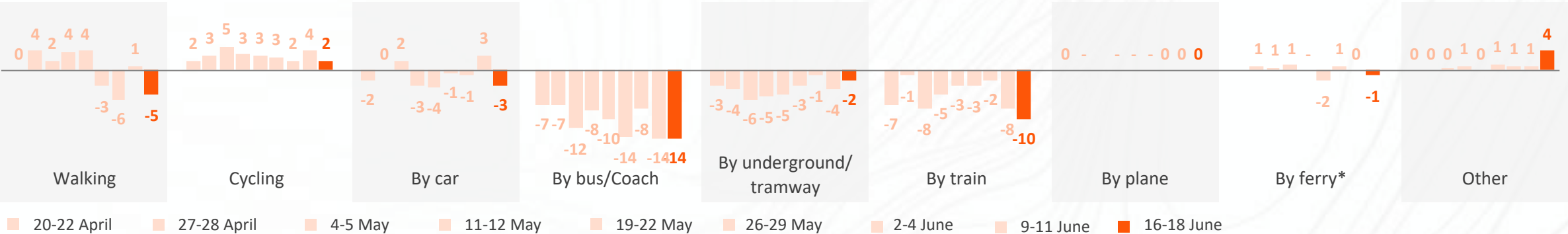


- Planning on doing it but don't know when
- By end of September 2020
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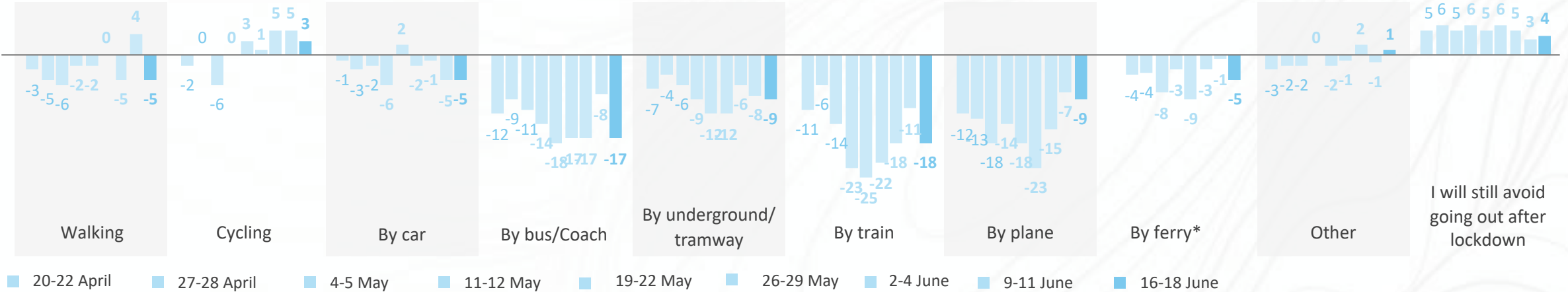
Despite the gradual easing of lockdown, cycling and alternative modes of transport are still on the increase for both commuting and leisure/business travel post lockdown



Commuters - Post lockdown net change in expected usage (%) Base (n= 172)

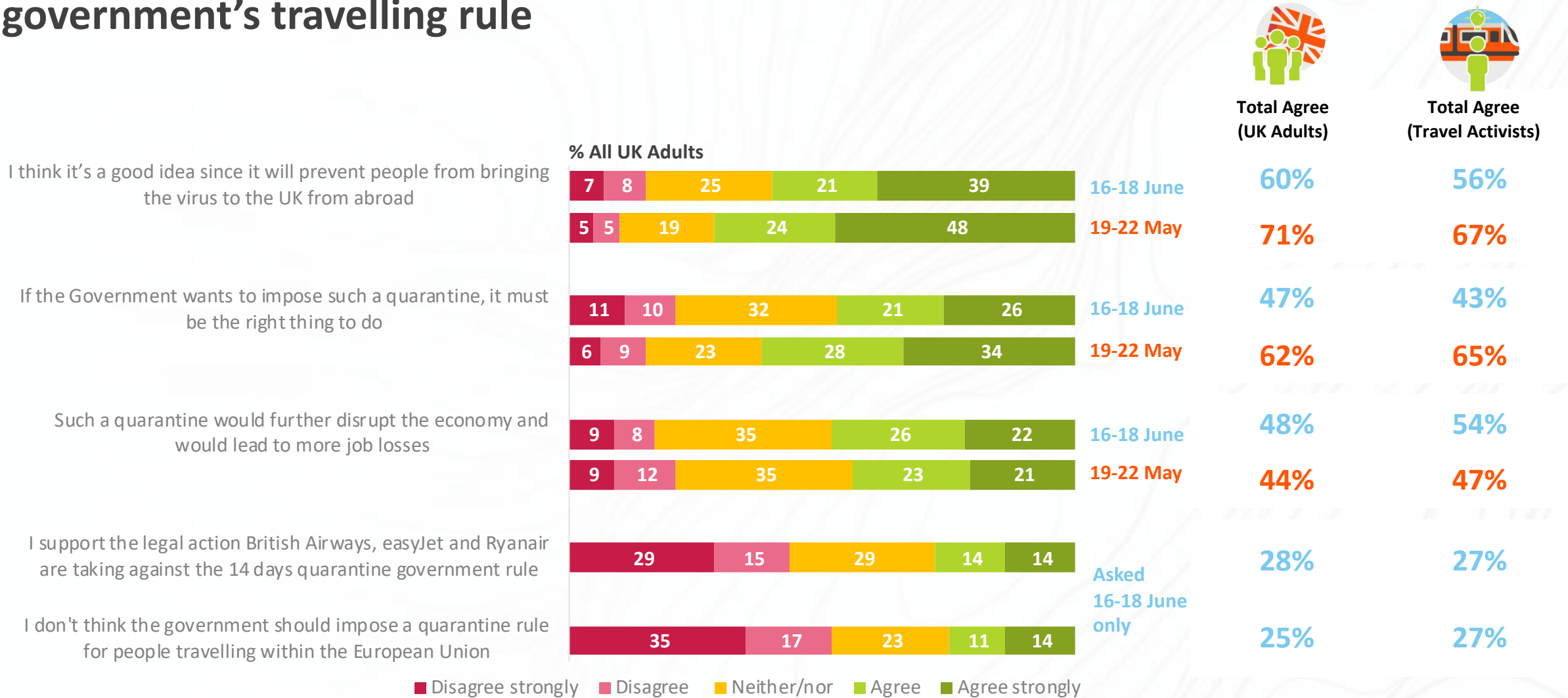


Leisure/business - Post lockdown net change in expected usage (%) Base (n= 209)



Q41: Before the coronavirus, how did you tend to travel...
Q42: After lockdown has ended, how do you expect to travel ...
* Added 27-28 April

The majority supports the 14 day quarantine rule, but by a smaller margin than last month. Almost half of respondents disagree with legal action taken against the government's travelling rule



Q61. As you may know, the government is considering plans to impose a 14 day quarantine on people arriving in the UK from abroad (with the exception of the Republic of Ireland) in response to the coronavirus pandemic. This includes those leaving the UK and wanting to return after a trip abroad. What do you think of such a plan? Base all

On social media – British Airways, easyJet and Ryanair received backlash from the public regarding the legal action taken against the government concerning the 14-day quarantine period. However, some are instead criticising the government for being unable to present scientific data to support the quarantine period

“ British Airways, EasyJet & Ryanair sue UK gov over quarantine rules with ‘no scientific evidence’ The banning of flights from Covid hotspots & the quarantining of incoming passengers should have been done in Feb/Mar. Now it is pointless. The gov is a joke ”

“ in the beginning the airlines did get some help, that's ended now and the insane Quarantine is destroying them all. That's hundreds of thousands of jobs directly and indirectly. They are scared of what govt will do which is why they stayed quiet but the 'nothing to lose' point is here! ”

“ so @British_Airways @EasyJet @Ryanair don't have enough money to pay back customers who wasted money on them yet have money to take the government to court over implantation of safety measures? Maybe use those generous CEO bonus' to save your companies instead. ”

British airlines challenge UK government's 14-day quarantine rule

“ This legal action by @British_Airways, @easyJet & @Ryanair is another example of what happens when @GovUK implements policy without presenting the data. That's not how science works. It's definitely not how democracy works. ”

“ So @British_Airways @EasyJet and @Ryanair value profits over the health and safety of people. Duly noted for when I'm booking flights post covid. ”

“ Whilst I think this policy should have been in place weeks ago not now isn't it ironic and hypocritical that @Ryanair @EasyJet @British_Airways are wanting to challenge this legally when they choose to ignore their legal obligations of refunding cancelled flights within 14 day ”

BA, easyJet and Ryanair launch legal action over UK quarantine

“ I want to be free as Dominic Cummings! Test all visitor and help the economy!! @British_Airways @EasyJet @Ryanair ”

“ Dear @GOVUK & @BorisJohnson, Just wondering how bailing out @British_Airways @EasyJet & @Ryanair makes sense during a #ClimateEmergency. Is this what you meant by a 'fairer, greener, more resilient economy'? Asking for a friend. Yours,

The British People

#BailoutThePlanet ”

Appendix



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Methodology

Survey of Consumers

Nationally representative online survey, conducted weekly. This week we surveyed 1,757 British adults.

During the first 8 weeks of tracking, our otherwise nationally representative survey filtered on people actively engaged in two of the following sectors:

1. Public transport / mass-transit
2. Visitor attractions
3. Hotels & paid-for accommodation

From Wave 9 onwards, we have not filtered on engagement with these sectors, but provide a directly comparable sub-sample of those who would have met the equivalent criteria.

For ease of reference in our reporting we use two icons to distinguish between the two audiences:



= 'Travel Activists' (based on the definition above and used in Waves 1 - 8)



= 'All UK Adults' (nationally-representative)

Social media analytics

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 capability 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.

Rigorous content cleaning and checks are set and regularly reviewed to ensure data quality. The analysis is focused primarily on conversations around the coronavirus over the past week.

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

- 23,265 posts for the transport sector
- 11,255 posts from the leisure sector
- 8,489 posts from the hospitality sector

Methodology for ‘The mood of UK businesses’ section only

This is a monthly survey of 1200 businesses with turnover £250k+

Online survey amongst financial decision makers in businesses with a turnover of £250,000 or more

- Sample drawn from a business panel
- Quotas set by turnover, region and broad sector
- Robust sample sizes in Manufacturing, Construction, Retail and Services, and a good spread by business size and UK standard regions
- Data weighted to be nationally representative by these key criteria

The questions were answered by 1200. Unweighted base sizes are shown to the right.

Remember that this is also an opportunity for you and your organisation to add specific questions. To do so, please get it touch!

Sample sizes by turnover	
<£1m turnover	250
£1-5m turnover	369
£5m+ turnover	581

Sample sizes by age of business	
Trading <5 yrs	123
Trading 5-20 yrs	459
Trading 20+ yrs	609

Sample sizes by sector	
Manufacturing	331
Retail Distribution	298
Services	571

Sample sizes by region	
North	285
Midlands	192
South	488
Devolved nations	235

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