

# Tracking Consumer Sentiment on the Impact of COVID-19

The mood of the nation & UK businesses,  
Travel & Mobility, Leisure & Hospitality

Weekly Update – 24<sup>th</sup> April 2020



**ALLIGATOR**



# Introduction

For those joining us for the first time this week, welcome to our report on consumer reaction to the COVID-19 crisis. At BVA BDRC and Alligator Digital we are tracking consumer reaction to the COVID-19 crisis to support our clients and followers through this challenging period.

In what is now an accelerating trend, the mood of the nation once again significantly improves this week. For the first time, those who believe *the worst is still to come* are in the minority. The proportion who think that *the worst has passed* is now approaching 1 in 5, with the plurality believing that *things are going to stay the same*. A lot of us, it seems, are acquiescing in this 'new normal'.

For the first time in this series of reports, we have also taken the pulse of business opinion. Business sentiment is broadly following that of consumers in becoming more positive. However, 27% of business leaders are not confident that their businesses will survive the crisis. 74% of businesses have already been negatively impacted, and a further 20% expect to be impacted in due course.

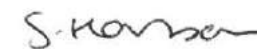
While consumers may be feeling happier as they soak up the April sunshine, the problem for businesses is that, if anything, anticipated lead times for *life getting back to something close to normal* are lengthening. However, there are some positive headlines this week when looking at specific categories – particularly for domestic tourism, visitor attractions and retail, as well rail and bus services.

As the volume and depth of data at our disposal continues to grow, there is unfortunately a limit to what we can sensibly include in a succinct weekly report. As the focus of many brands turns to winning hearts and minds in the post lockdown period, we will be releasing a series of reports and webinars, addressing specific business issues and sectors. Watch out for details of these, landing in your inbox soon.

Stay tuned and stay safe!



**Matt Costin**  
Managing Director, BVA BDRC



**Suzy Hassan**  
Managing Director, Alligator Digital

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# Executive Summary

The mood of the nation takes another turn for the better this week: our average mood in the UK on a 10 point scale climbs to a post-crisis high of 6.7. Last week's dramatic decline in the proportion of the population who believe *the worst is yet to come* is repeated with an even bigger drop this week. As it stands, fewer than 2 in 5 retain this pessimistic view, while the plurality now believe that *things are going to stay the same* for the time being.

This improvement in national mood and optimism is mirrored by people's perception of their own financial situation – though not to the same extent. While it has not changed dramatically since we began tracking a month ago, over the last two weeks there has been a 5 point drop in the proportion of people who consider themselves to have been negatively impacted by the crisis, with a commensurate increase in the proportion who describe their finances as 'alright'. This 'alright' group continues to over-index among retired consumers and its expansion may partly be linked to some recovery in the stock market.

Our Business Opinion Omnibus tells us that business sentiment has also improved somewhat since the start of April. However, most business leaders think that *the worst is still to come* and 27% admit that they are not confident that their business will survive the crisis. Undoubtedly this figure would have been higher but for the Government's decision to extend its 'Job Retention' (furlough) scheme to cover June. But with many businesses still in doubt about whether they will be able to open their doors again in July, the continuing uncertainty comes as no surprise.

While they may be feeling more positive than they were a month ago, UK consumers are typically less optimistic than they were previously, about when life will return to something close to normal. Just over half of us (54%) expect a return to normality by the end of Q3 (cumulatively), down from 67% two weeks ago. Though a minority, the proportion that doesn't expect normality until 2021 continues to grow.

How this plays out for consumer spending will inevitably vary from sector-to-sector, with Government restrictions and advice key enabling factors. In terms of consumers' current intentions, our data this week indicates that prospects for the international holiday and aviation markets in the next 6 months continue to worsen. On the other hand, there is a degree of improvement in outlook for the domestic holiday market, visitor attractions, bus and rail services.

Even in those sectors for which we detect some shortening of anticipated re-engagement lead-times, there are caveats. For all forms of public transport there is lower intended usage (for commuting, business or leisure) relative to the pre-Covid period. Across multiple leisure sectors (including attractions), there are a range of measures and conditions which large proportions of consumers will expect to be in place before they re-engage. We will be issuing separate sector-specific reports on this in the coming days.

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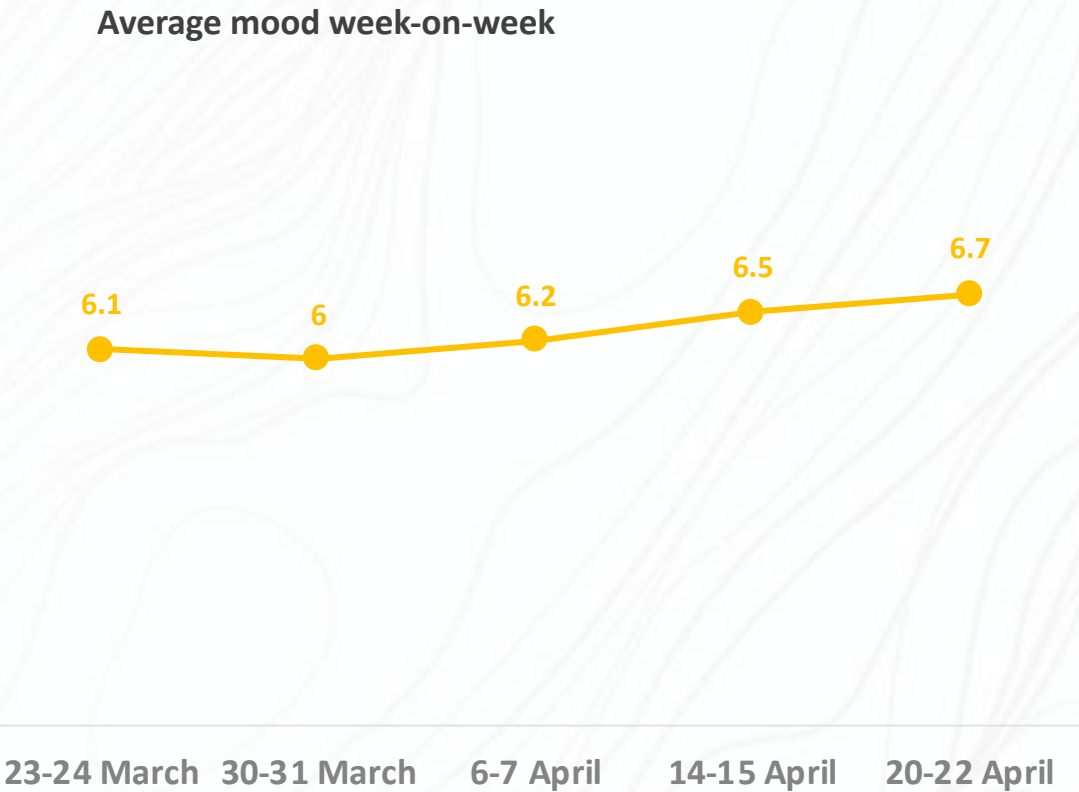
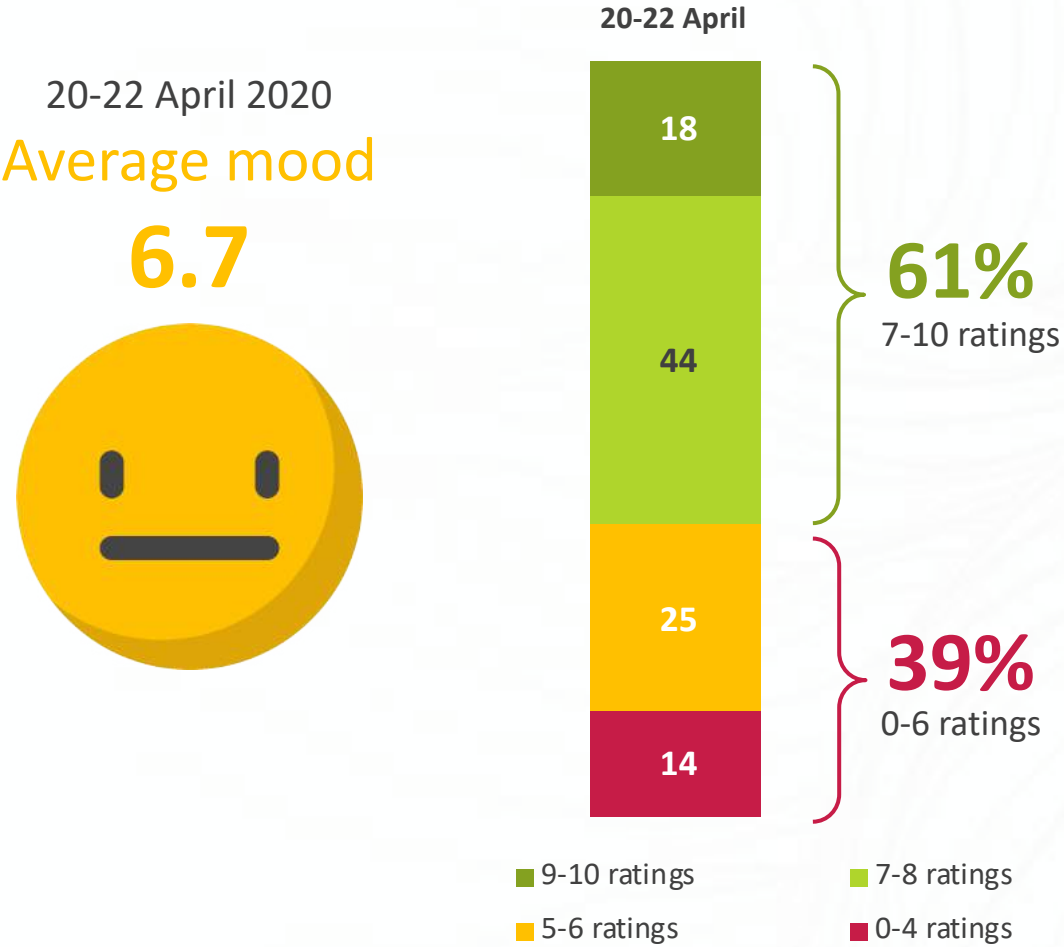
# The mood of the nation



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# The UK's national mood is improving consistently, week-on-week. More than 3 in 5 of us are now in a positive mood.

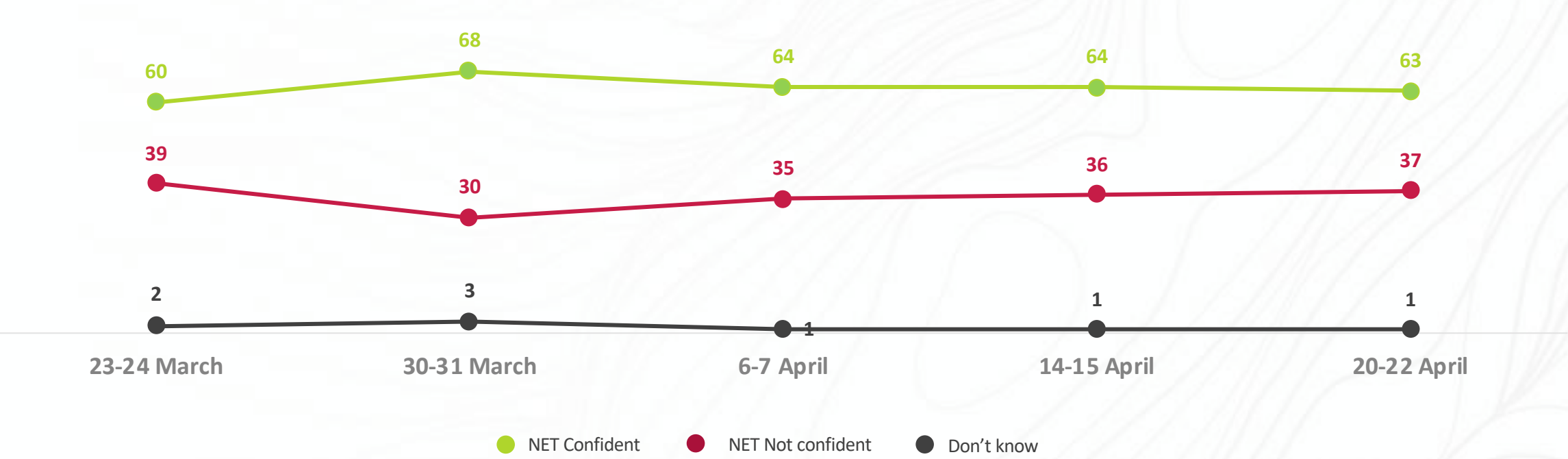


Q5: How would you rate, between 0 and 10, your mood today? (%)



# Confidence in HM Government’s handling of the crisis changes only marginally from week-to-week, but edges further downwards from its end of March peak.

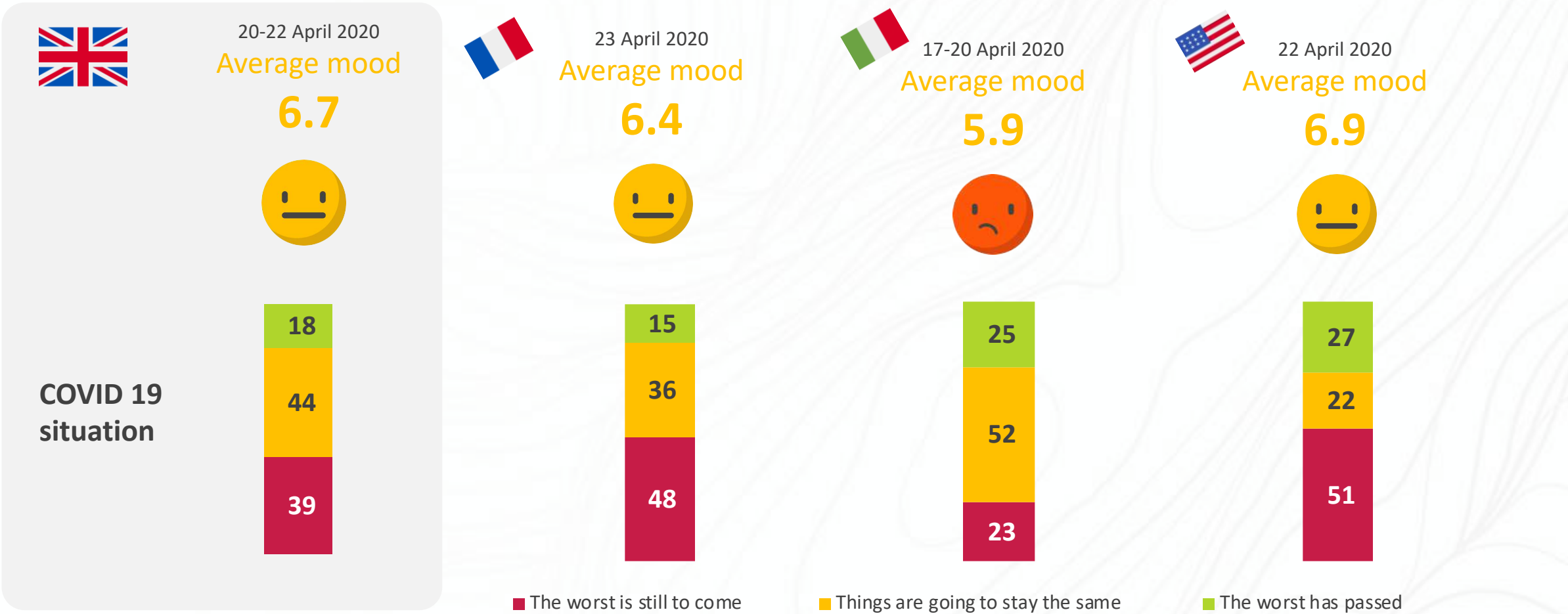
Q6: Would you say that you are completely confident, somewhat confident, not really confident, not at all confident regarding how the British government is handling the crisis? (%)



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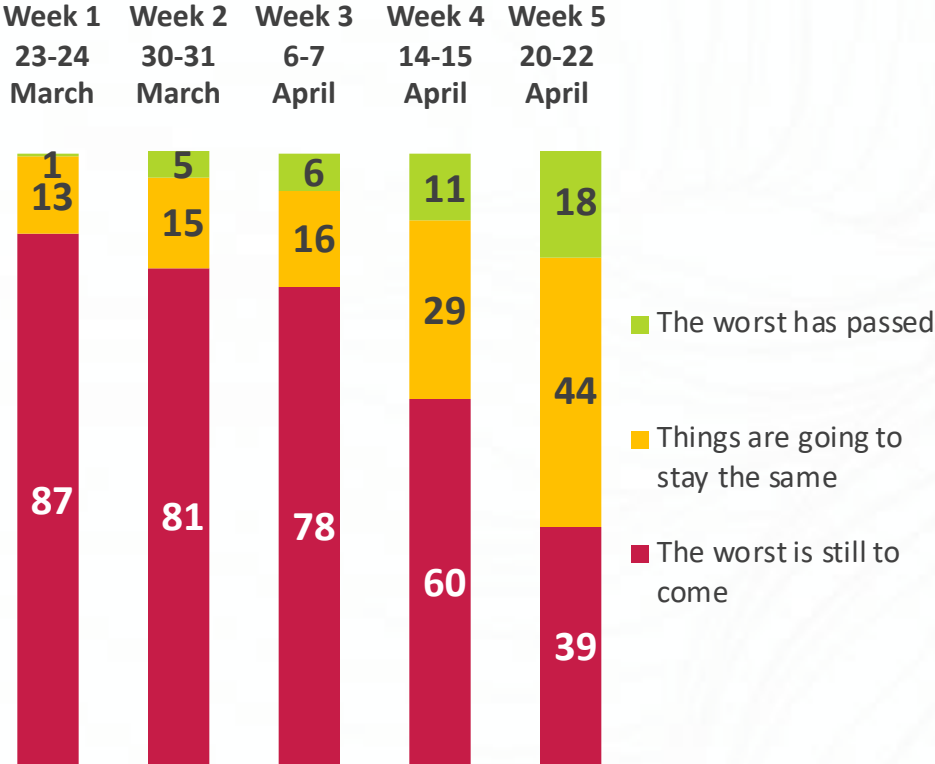
# National mood, and the extent to which populations feel that the *worst has passed* or is *still to come*, are not necessarily correlated across countries.

Doubtless due to the severity of the crisis but also its timing, Italy continues to report the lowest mood of the nations tracked in our reports but it also has the most positive 'worst has passed vs still to come' net figure. The USA reports the most polarised view on the status of the crisis, but also the most positive national mood overall.

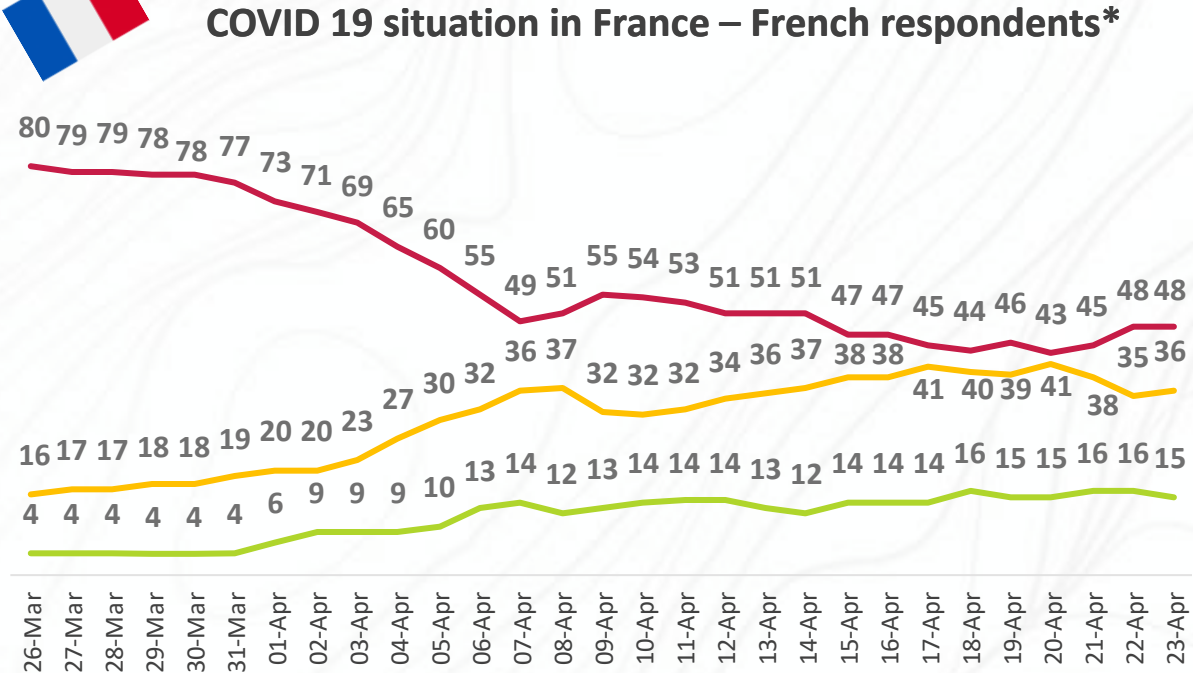




Last week's significant decline in the proportion who feel *the worst is still to come*, is followed by an even bigger drop this week. The plurality now feel that *things are going to stay the same*.



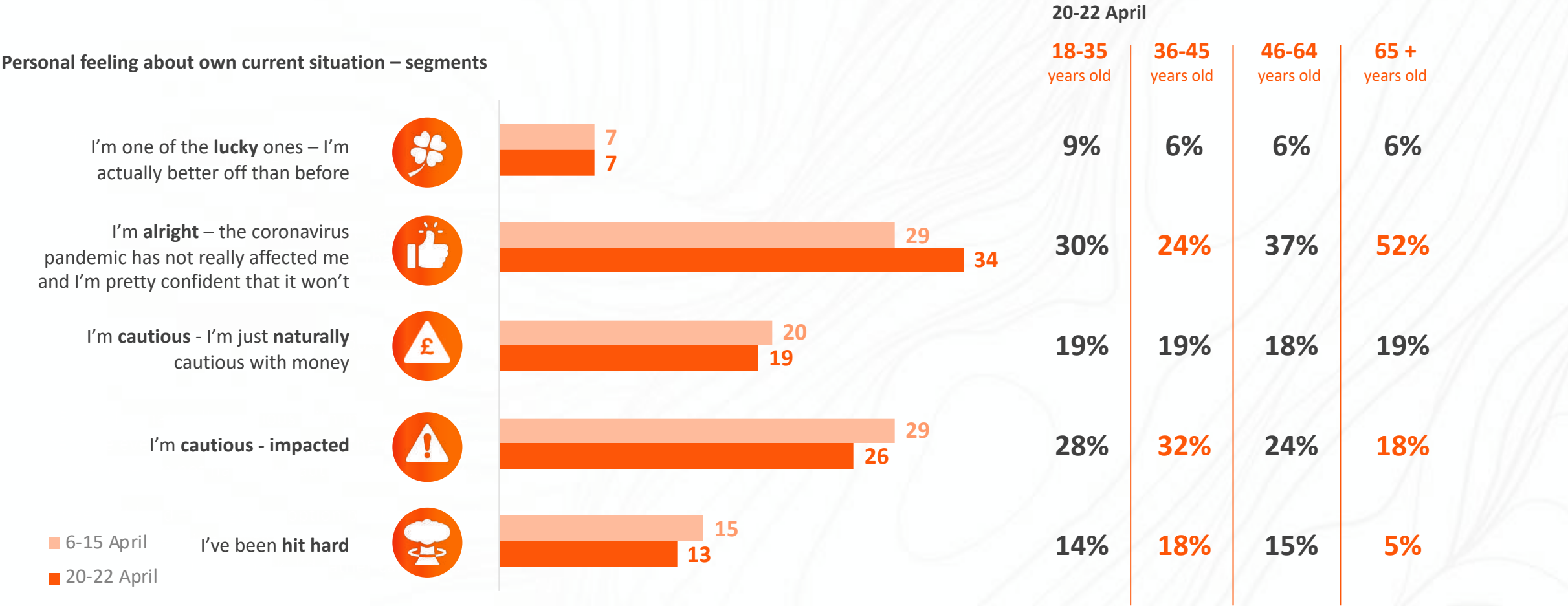
Since the start of the crisis, we have reported that the UK has been approximately 10 days behind France in terms of our perception of the crisis. For the first time, however, we are now reporting a more positive position in the UK, with significantly fewer people believing *the worst is still to come* and slightly more saying that *the worst has passed*.



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? (%)

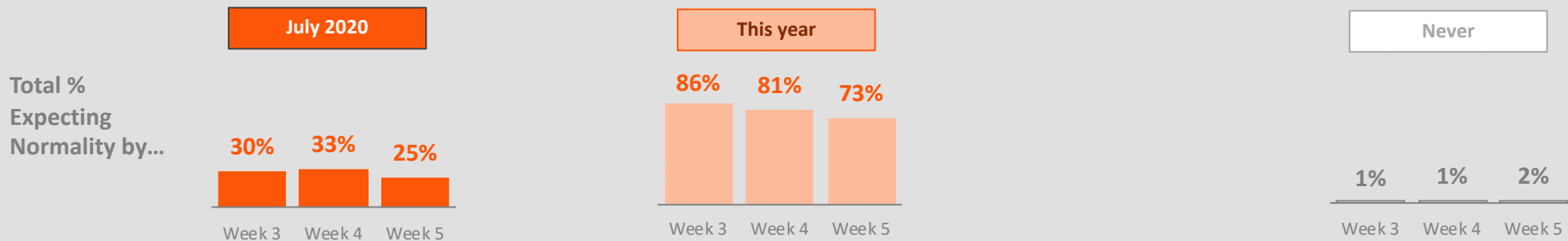
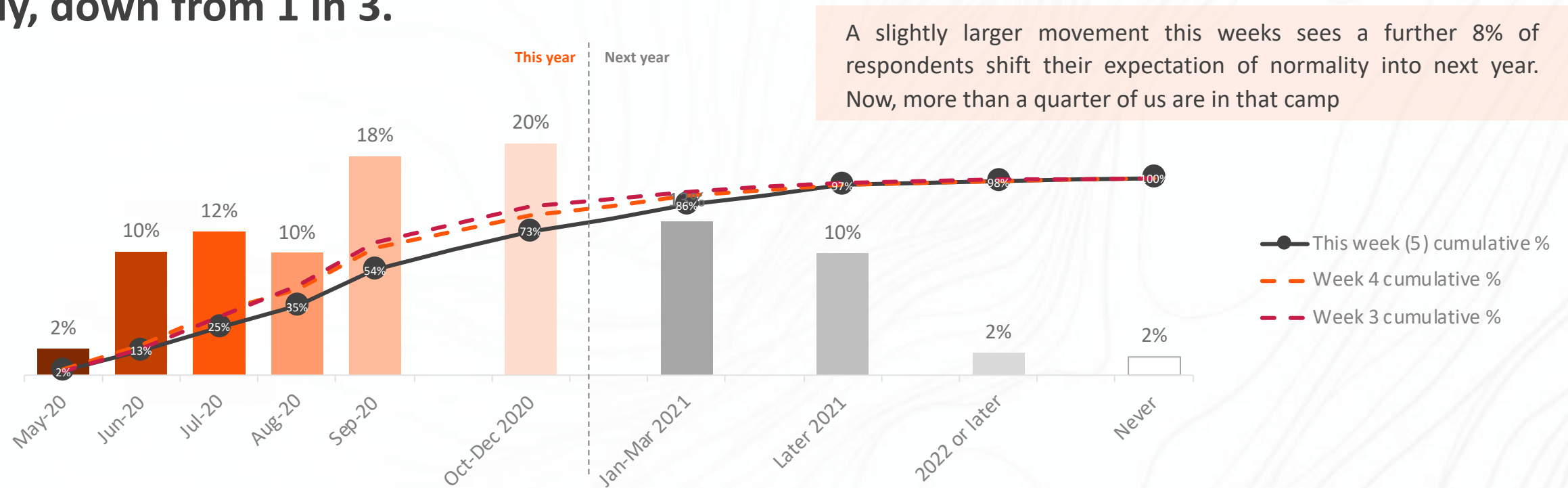
\*BVA daily tracker on how the situation is changing in France. More info, contact Adélaïde ZULFIKARPASIC ([adelaide.zulfikarpasic@bva-group.com](mailto:adelaide.zulfikarpasic@bva-group.com))

While our financial mindsets have not changed dramatically since the start of the crisis, there has been a 5 point drop in the proportion who feel that they have been impacted, with a commensurate increase in those who feel ‘alright’.



Q17: If you had to choose, which ONE of the following statements would best describe your feelings about your own situation, right now?  
Q18: Some people are just naturally cautious with money. Others have become cautious, because of their financial situation during the coronavirus pandemic. Which one of the following best describes you?

While we are in a better mood, our forecasts of when life will return to normal continue to edge backwards. Only 1 in 4 expect a return to normality by the end of July, down from 1 in 3.



# Belief (mixed with concern) that social distancing will be the new norm until vaccine is found

**Concern that prolonged lockdown and restrictions until vaccine is found will affect economy and people's well-being...**

“It is not feasible to wait for a vaccine. We can, like other countries are doing, phase the exit strategy by sectors, ages, level of automation at work. Need to use mass testing and contact tracing. Need to use distancing procedures at work. There are ways ...”

“They never should have shut. Kids aren't at risk, we can't wait for a vaccine, so isolate the elderly and vulnerable and reopen everything. The lockdown will end up killing many times more. Cancer, heart attacks, strokes, depression, suicide, health effects of mass poverty”

“We can't wait months and months for a vaccine. Economic calamity will force people to get back on with it, hopefully sooner rather than later.”

“Most businesses won't exist if this goes on much longer. Well, small businesses anyway. And if they plan to make us wait for a vaccine (as they seem to be suggesting) then there won't be any businesses left - except funeral directors.”

**...However, social distancing is essential when lockdown is lifted**

“I see a long-term need for social distancing and PPE but I am hopeful about easing lockdown while keeping restrictions in place. The science community is working fast to understand the illness, to produce effective medicines /treatments as well as a vaccine - that gives me hope.”

“I guess we will have to wait for a vaccine then? Until then we'll have to stay under some kind of restriction in terms of gathering in groups etc”

“Yeah I think you're probably right. Some restrictions will gradually lift but there will be some form of social distancing until a successful vaccine is here.”

“People really be out here fuming that lockdown is happening for another 3 weeks as if it's a shock??? We won't be back to normal till there's a vaccine which is like 12 months away. Many of us looking at social distancing/isolating until then bc it will simply be too dangerous.”



# Can we wait or not? The debate rages on social media.

“I'd also be wary of booking anything until countries publish their requirements for foreign visitors”

**# Unsure**

“Support Local Business!★ #Aftercovid19💙, let's all plan a well-deserved staycation!”

**# Staycation**

“@British\_Airways have cancelled my flight in May and have not offered a refund. I do not want to change date and travel within 12 months.”

**# No travel in next 12 months**

“Who else is looking forward to being on the other side of this, being safe, and being back in the pub?  
I know I am. #publife”

**# Pub**

“I look forward to travelling when the time is right but it isn't going to be in May for sure”

**# No time soon**

“I will shop and go places less often than before”

**# Changes to behaviour**

“So if social distancing is to be maintained until a vaccine, there's no way airlines are going to fly again, so goodbye to a holiday abroad until next summer”

**# No travel in next 12 months**



# Key themes underlying positive and negative sentiment

“Translink has given two trains very special makeovers in support of the #ChaseTheRainbow movement sweeping the nation. Northern Ireland’s public transport operator has recently unveiled the massive ‘Trainbows’, transforming NI Railways trains into moving symbols of hope and solidarity for people as they see them travelling across the network.”

## # Kindness & Generosity

“Always check Expedia first when planning travel. This time, due to the coronavirus, I had to change reservations made previously, and had to deal with a customer service person in order to take advantage of the airline refund. Was on the phone for quite a while, but two separate flights were taken care of and re-booked. Appreciated the service.”

## # Good service

“I think everybody is waiting for a refund and @jet2tweets is probably a little understaffed and over stretched. Compassion and patience might work too.”

## # Patience

“IHG launches global effort to feed local communities IHG® (InterContinental Hotels Group), one of the world’s leading hotel companies, has just announced global partnerships to support food banks and other food provision charities in assisting those most in need during the Covid-19 crisis”

## # Kindness & Generosity

“One thing has become abundantly clear during this crisis...I will never use @Expedia or fly @VirginAtlantic @VirginAirline again! Been more than a month since we started calling and still no refund after HOURS on the phone and several emails! Want my money back please!!!”

## # Loss of service continuity

Since the beginning of the crisis we have reported on the key themes surrounding brands in customer conversations. *Kindness, generosity and compassion*, as well as *innovation and commitment to service continuity* have come increasingly to the fore, along with more pronounced hostility to policies perceived to be *selfish*.

“@Ryanair WHY have I been told for the last 4 weeks that I will be getting a refund and today you’ve backtracked and are now offering customers travel vouchers! Absolute shambles of an airline! #ryanair #wheresourrefund #shambleair”

## # Selfishness

“Bet the car insurance companies are making a packet at the moment whilst many companies are struggling! Wonder if they will step up and offer reductions for those of us now not on the road? #carinsurance #coronavirusuk @AvivaUK @Lvcares #insurance @comparethemkt @DirectLine”

## # Selfishness

# The mood of UK businesses

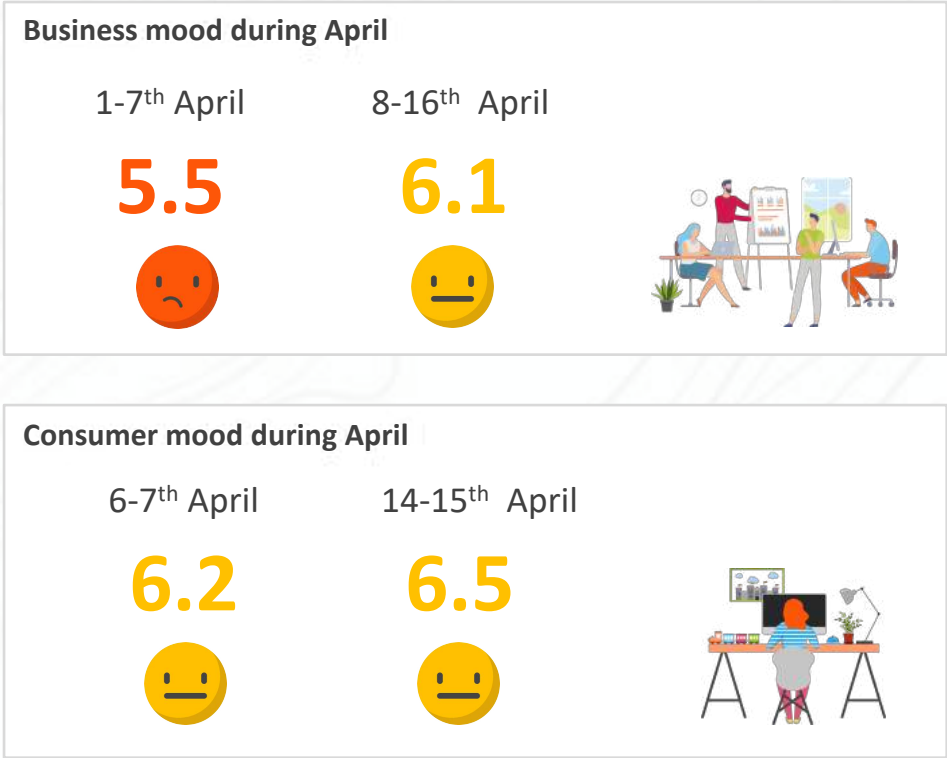
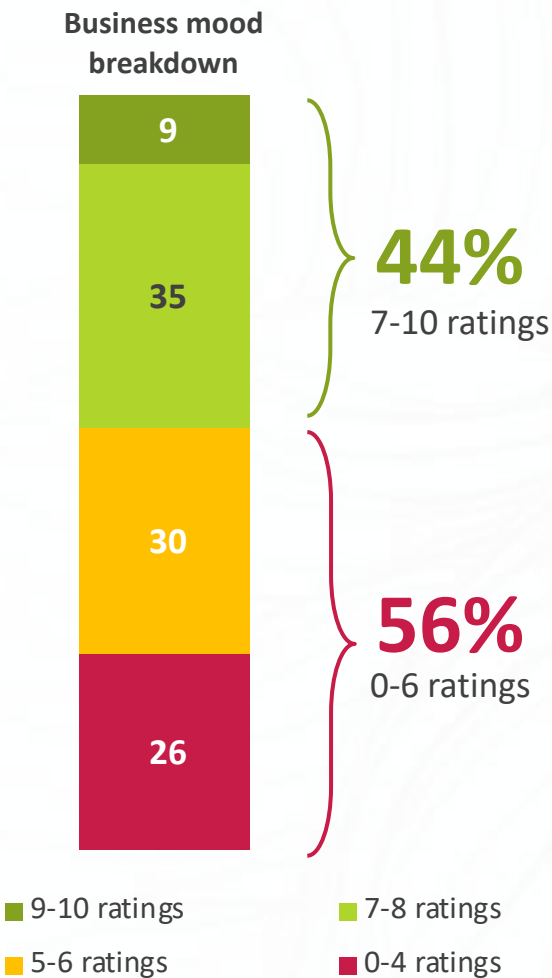
A comparative assessment of business sentiment collected via our Business Opinion Omnibus in the first half of April

*Nationally representative online survey of 1200 business decision makers\**

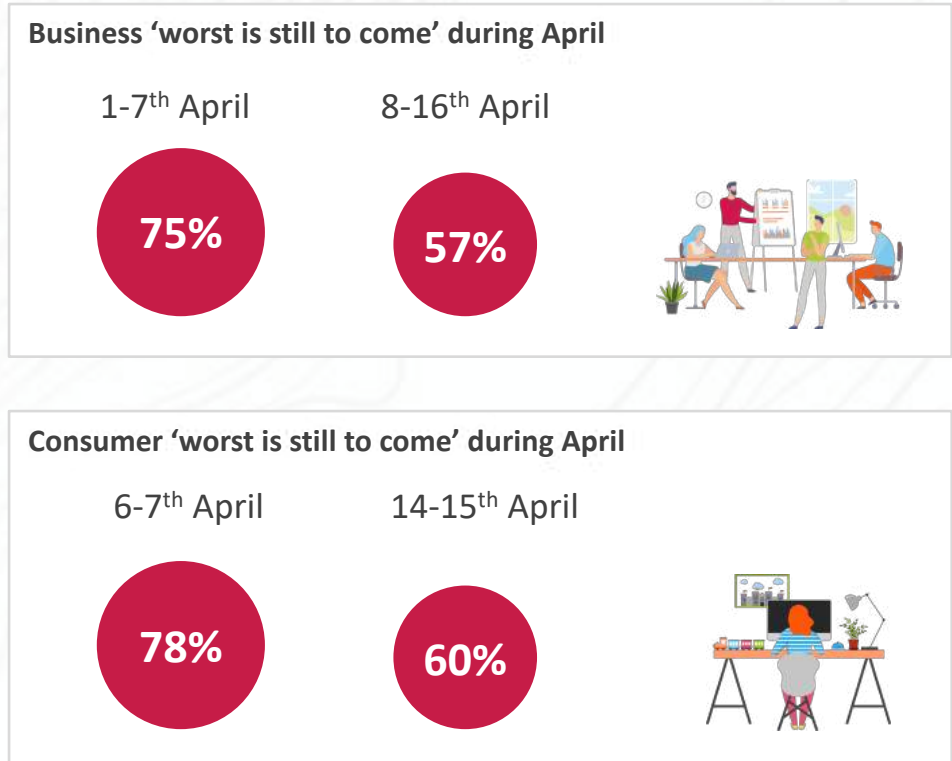
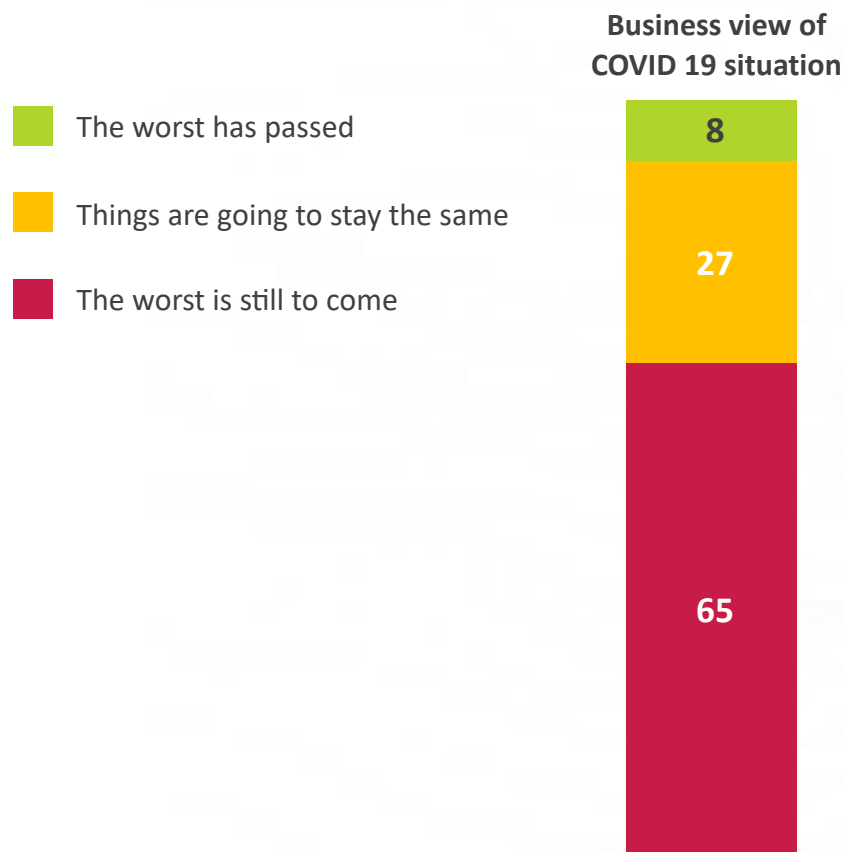


# The mood of businesses is divided, and less optimistic than consumers, but nonetheless follows the same pattern of improvement during April

1<sup>st</sup>-16<sup>th</sup> April 2020  
Average mood  
**5.8**



# When it comes to the overall COVID-19 situation, businesses share a similar outlook to consumers, again with an improved view by mid April

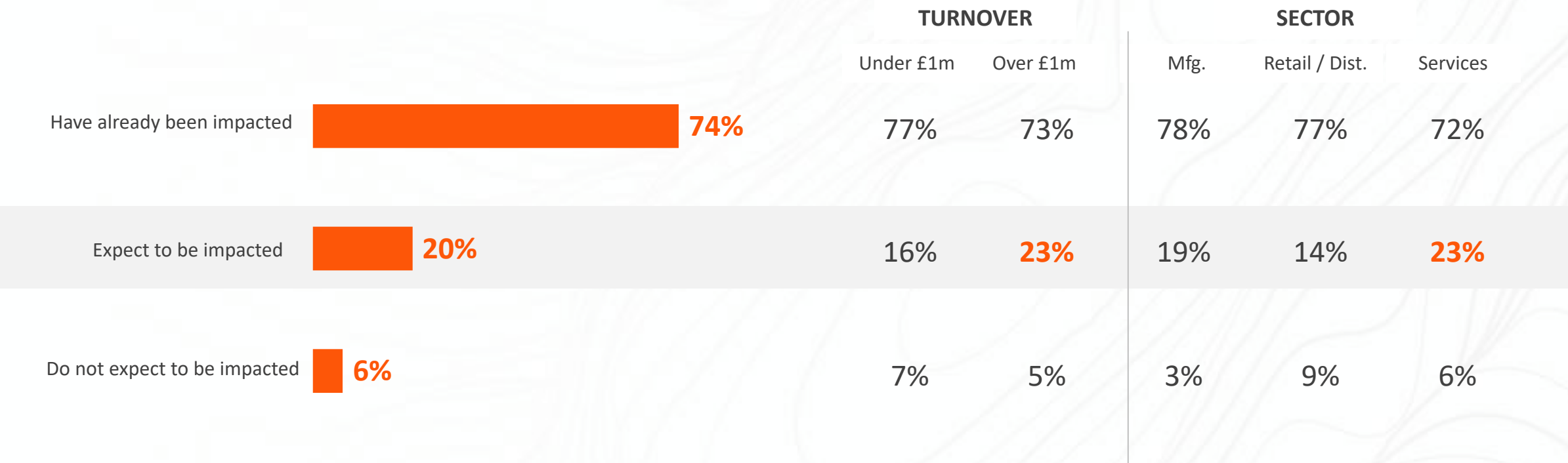




# ¾ of businesses have already been affected by the pandemic, while only a minority expect to escape completely unscathed

- The effects of COVID-19 are naturally being felt more acutely by businesses, given that trading is more immediately affected than personal finances
- 44% of consumers had been ‘hit hard’ or ‘impacted’ to some extent in the first half of April, compared to 74% of businesses

Larger businesses and the service sector are slightly more likely to see the impact on the horizon rather than already feeling the strain. This could be as a result of higher cash reserves, existing finance facilities or a greater ability to access finance if needed. Larger businesses are also more likely to have several senior specialists to help manage the situation.





# On social media - how are businesses coping?

The #Covid19 crisis has tragically led to a lot of job losses and business closures.

**# Losses/closures**

The director of a City fitness studio said he fears the company could go bust after being rejected for support under the Coronavirus Business Interruption Loan Scheme

**# Fear**

Times are challenging for the local newspaper industry. The Coronavirus outbreak has hit us hard due to declining advertising revenue and a reduction in newspaper sales while our readers are in lockdown

**# Challenging**

The significant financial losses suffered by Ipswich Town during the coronavirus crisis #itfc

**# Financial loss**

The Rank Group has reported a 5% year-on-year increase in statutory revenue for the third quarter, despite the business being impacted by the ongoing novel coronavirus (covid-19) outbreak

**# Wins**

The digital arm of its Grosvenor Casinos business saw revenue climb 27%, due in part to continued growth in new players and strong levels of returning players. Mecca Digital also performed strongly with net gaming revenue up 20%.

**# Wins**

- Social media comments illustrate the widespread impact of the pandemic, including some household names.
- The gaming sector stands out as an exception, but it by no means universal across brands

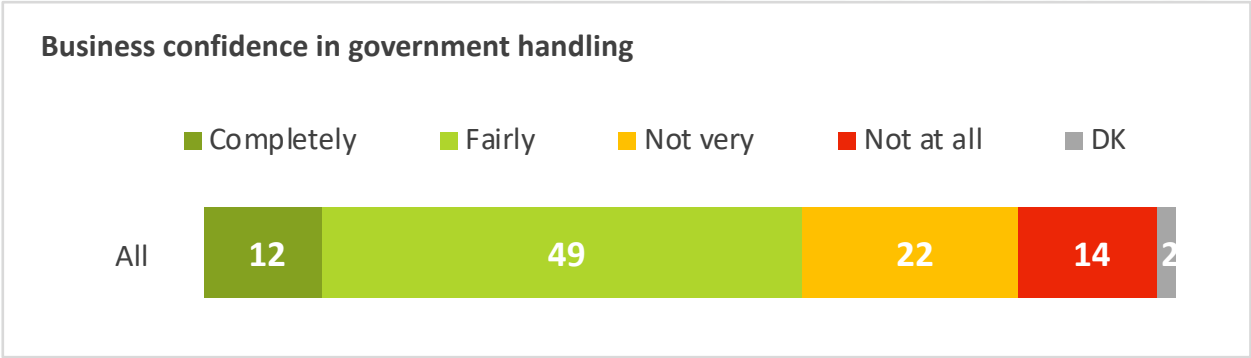
Could lose as much as £507 million if travel restrictions remain in place for the next six months. A three-month period of restrictions could lead to £245 million in lost revenue and 5,000 job losses

**# Monetary losses**

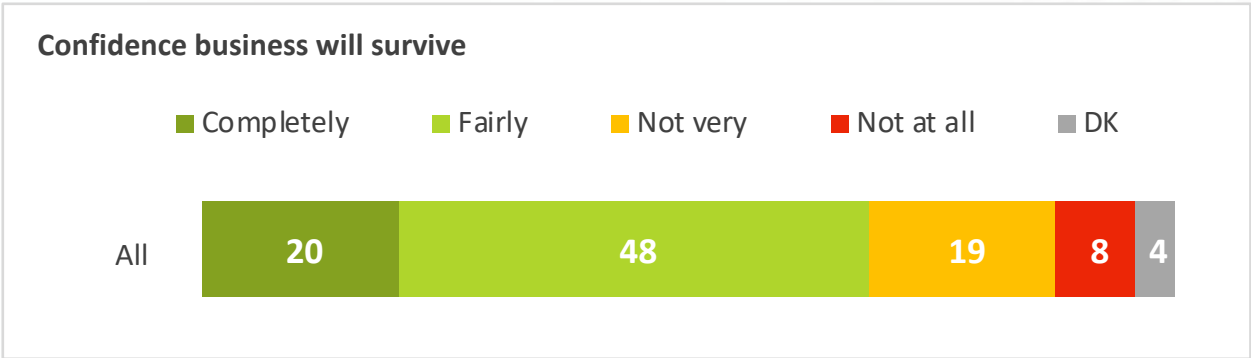
Online revenue at Paddy Power Betfair has declined by almost a third over the past four weeks compared with the same period last year

**# Revenue loss**

# With just over 6 in 10 confident in the Government’s handling of the situation, business sentiment is broadly in line with consumers



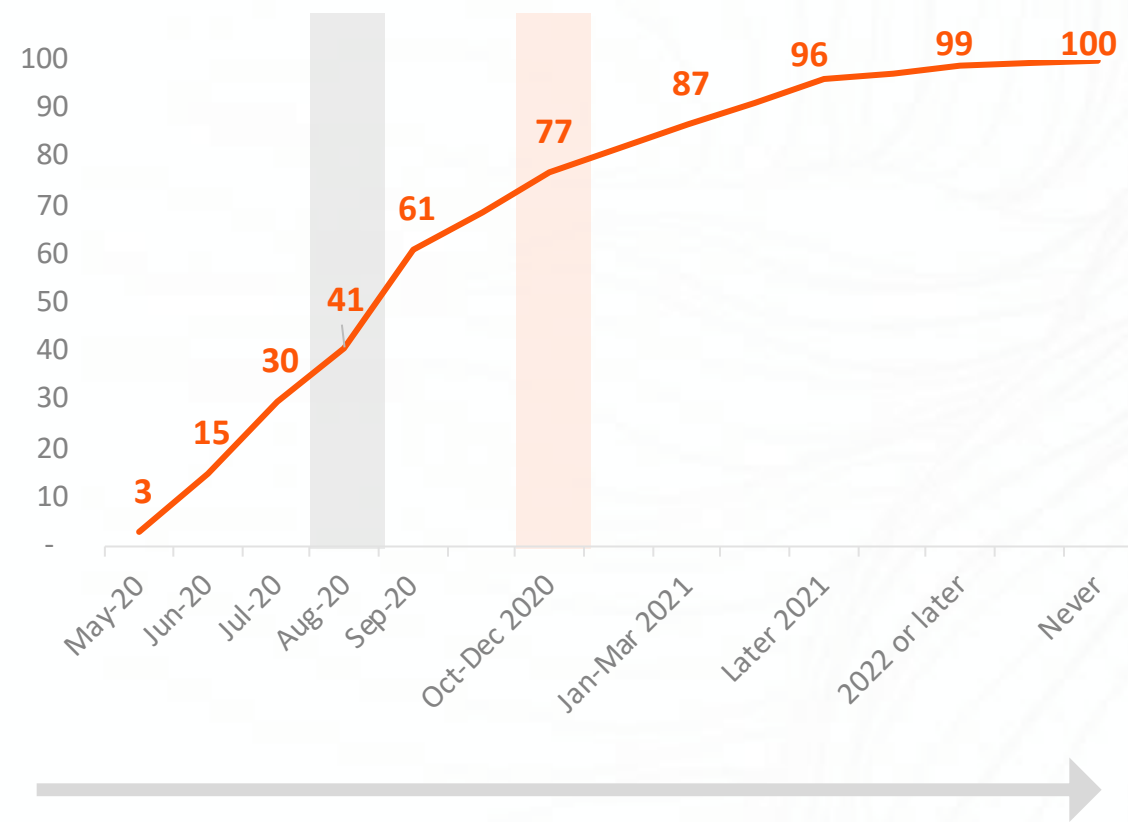
However those who are confident of their own business survival are twice as confident in the Government’s handling of the crisis



	Confident in own survival	Not confident of survival
Confident in govt.	73%	36%
Not confident in govt.	26%	64%

# While 4 in 10 expect business to be ‘normal’ this summer, ¾ think it will take until Christmas

When will business get back to normal?  
(Cumulative)



Survival is also closely linked to how long the current situation will last - 5 in 10 of those very confident of surviving think we will be back to normal by August, compared to 2 in 10 who are *not at all* confident

Back to normal by...	End August	Christmas
All	41%	77%
Very confident will survive	50%	83%
Fairly confident	44%	81%
Not very confident	35%	71%
Not at all confident	19%	41%

# Travel and leisure

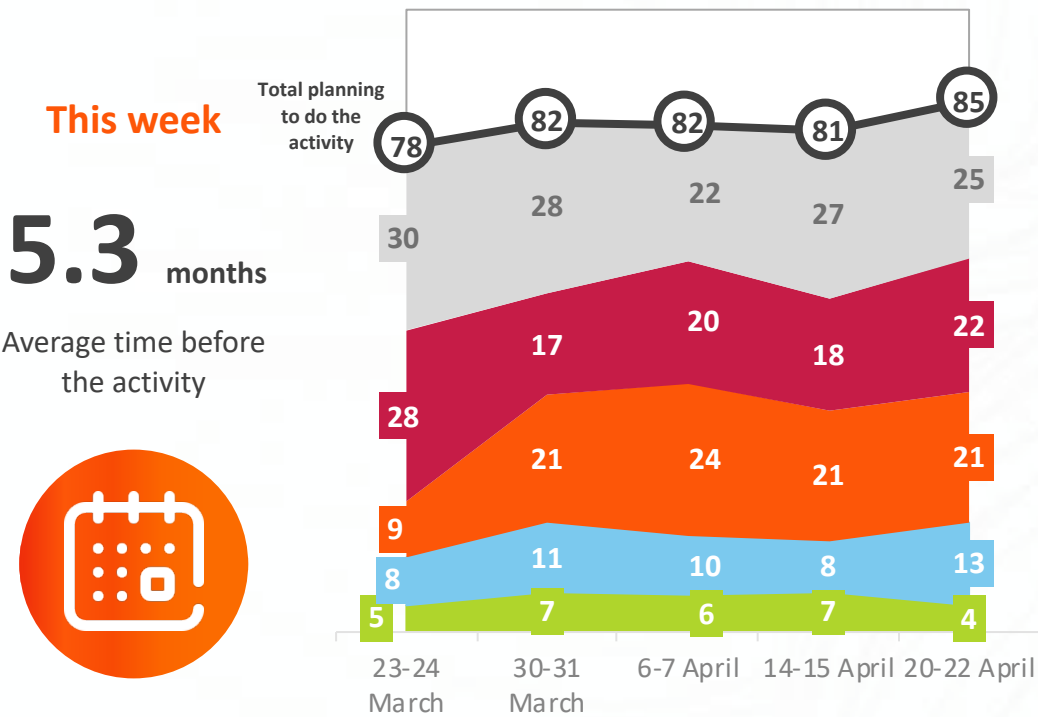




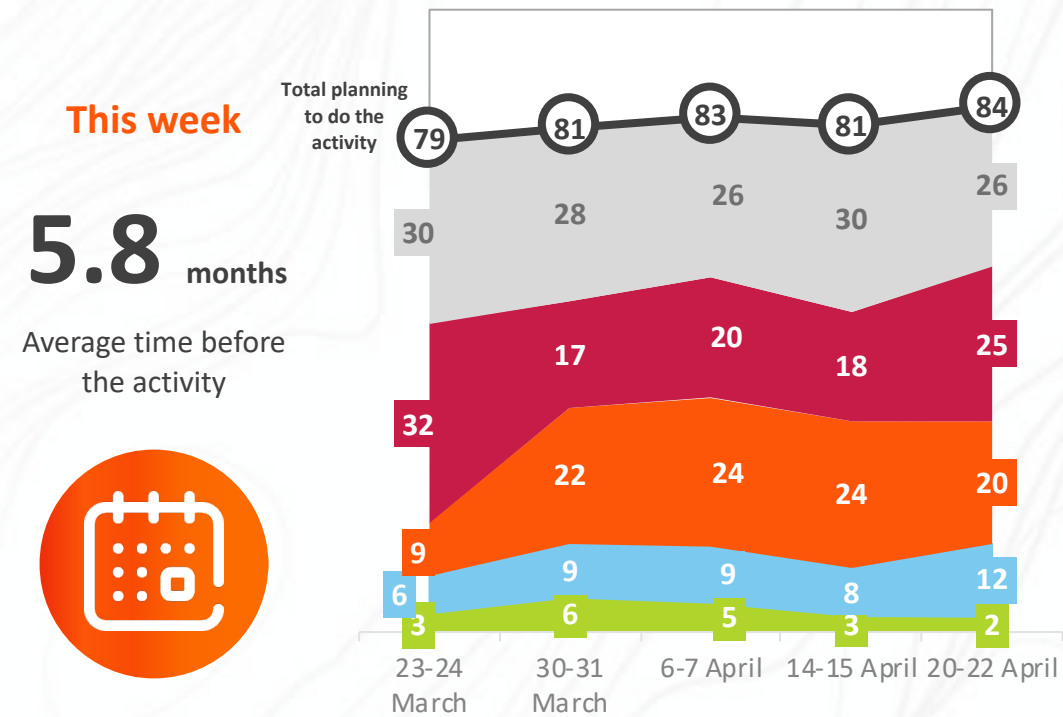
# More Britons are planning a domestic holiday than in any of the previous 4 weeks

For the first time in three weeks, the proportion of Britons thinking about taking a UK holiday has increased. However, there is no evidence of summer holiday consideration also rising, the average time before planning a trip still over 5 months away. This will continue to cause concern for the UK tourism industry for whom the summer season is the financial bedrock of their year. If the public's expectations are to change, the UK government will need to provide assurances on the type of trips that are possible, and what tourism organisations can do facilitate them.

## Plan a UK holiday



## Book a UK holiday



- Planning on doing it but don't know when
- Not planning on doing it
- Within the next 6 to 12 months
- Within the next month to 3 months
- Within the next 3 to 6 months
- Within the next month



# There is plenty of evidence on social media that the public is longing for summer holidays, the scenery and landscapes of Cornwall a particular talking point



Cornwall

underthezee What is the first place you will visit after lockdown? I think I'll be heading to this hidden gem again... Picnic, swim and some outdoor ugly dancing 🧑🏻🧑🏻🌿



I love Cornwall

14 April at 09:00 · 🌐

The response to our last coastal video was fantastic... with record breaking views and shares... lets see if this one can get close? Sorry about the line across the centre, that's what comes of not having a viewfinder on your camera, I hope it won't distract from the view? Enjoy!

“ I just spent a lovely walk with my 10year old reminiscing all things Cornish ❤️ this just brings me such joy when we are so far away from those gorgeous shores ”

“ Thank you that was a stunning video lovely that you live there we can at the moment only see Cornwall by this medium but when this pandemic is just a memory we will be able to be there and enjoying it for real ”

“ We visited St Ives a couple of years ago and were blown away by the beauty of this little place and the things to do in this seaside town. When it's safe to visit again we will <https://buff.ly/2XiqQIV> #StIves #Cornwall #staycation ”

“ Top of my list is a visit to see the grandchildren, followed by my brother in the Norfolk Broads & weekends away to the Lakes, Highlands & Dorset. Not forgetting the beautiful beaches of Cornwall & Devon.....oh, and walking on Dartmoor.....so many things to look forward to. ”

“ Fingers crossed We will be visiting in August. We will be bringing our grandson for a weekend. Love Cornwall. ❤️ ”

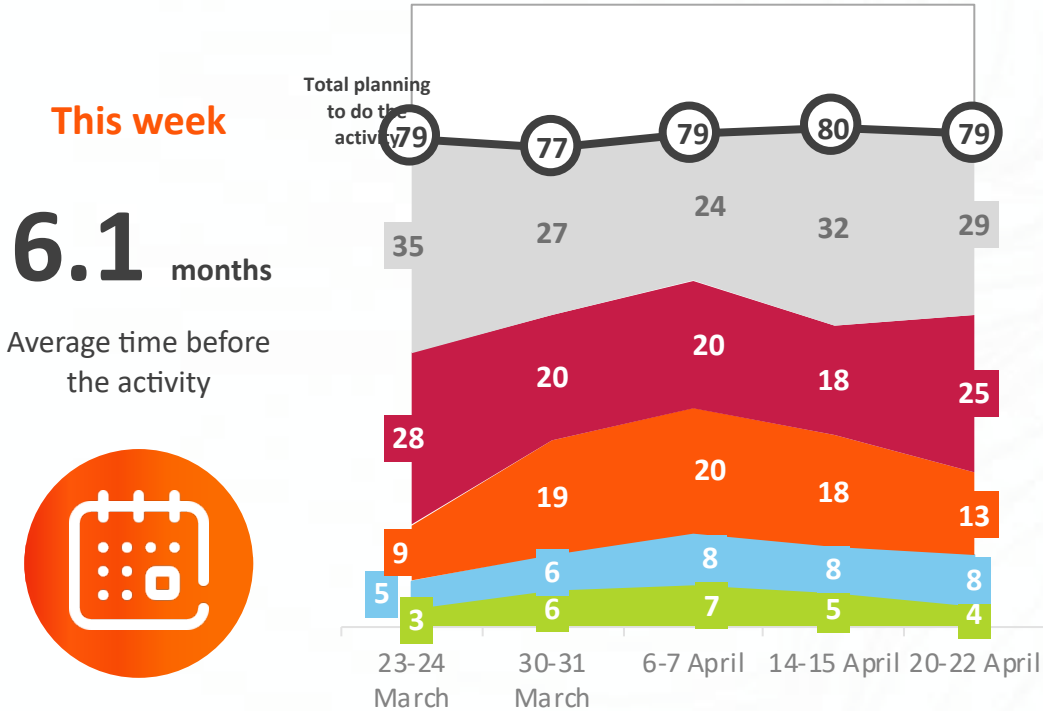
“ Can't wait to visit Cornwall again when this is over, there's nowhere like it ”

“ Wonderful I've always wanted to go there. Been to Cornwall many times, miss it so much ”

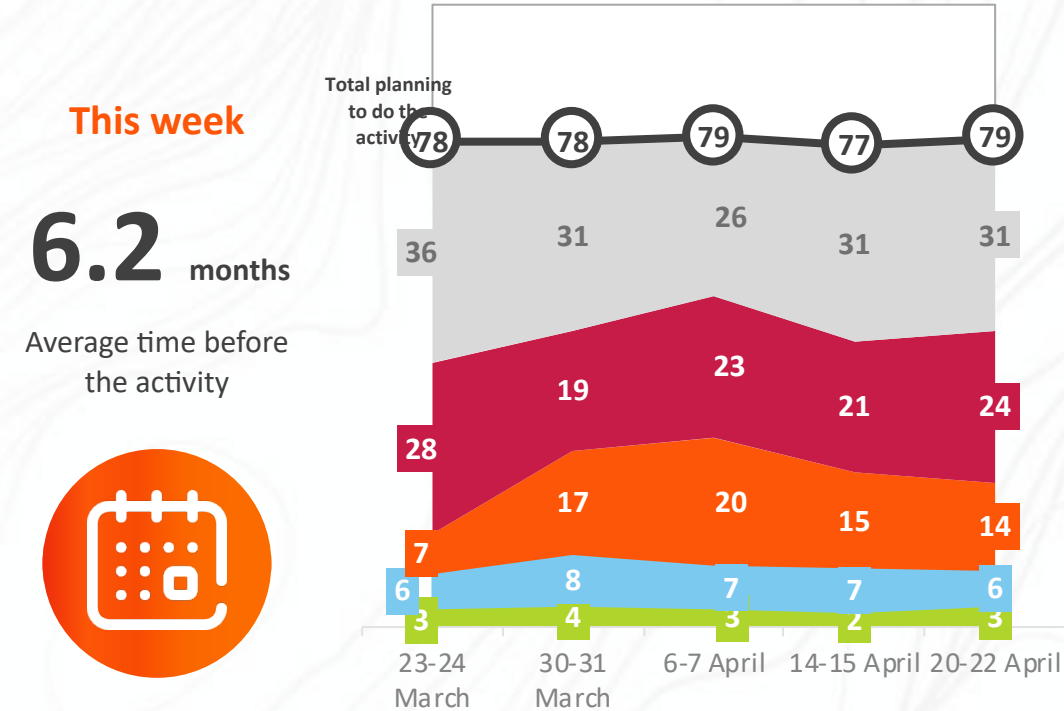
# Expectations of overseas travel have become more pessimistic this week, trips now over 6 months away

Unlike UK trips, there has been no uptick in the proportion of Britons planning a trip overseas. In contrast, the immediate prognosis for overseas trips is less positive than in previous weeks. This week sees the second consecutive drop in Britons anticipating an overseas trip in the next 6 months, the average planning time rising to 6.1 months (from 5.3 last week). This will come as sobering reading for the UK's tour operators in a week where some have sought government financial aid.

## Plan an overseas holiday



## Book an overseas holiday

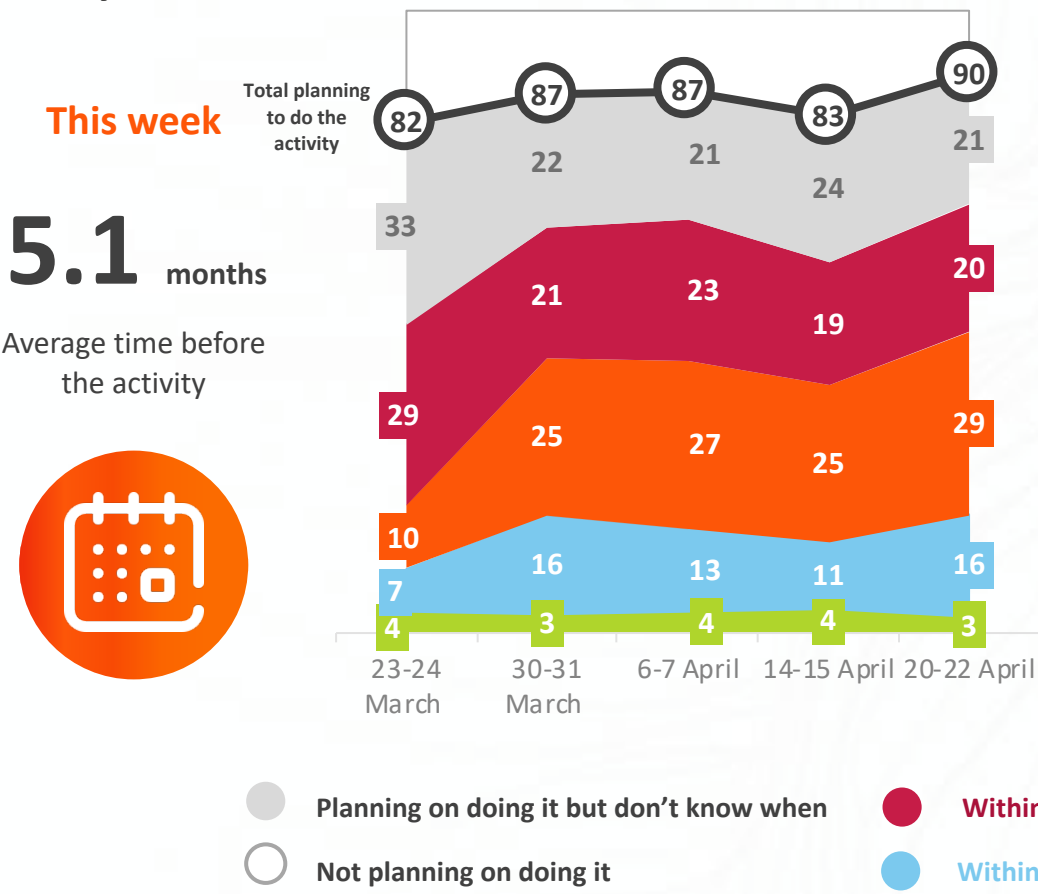


- Planning on doing it but don't know when
- Not planning on doing it
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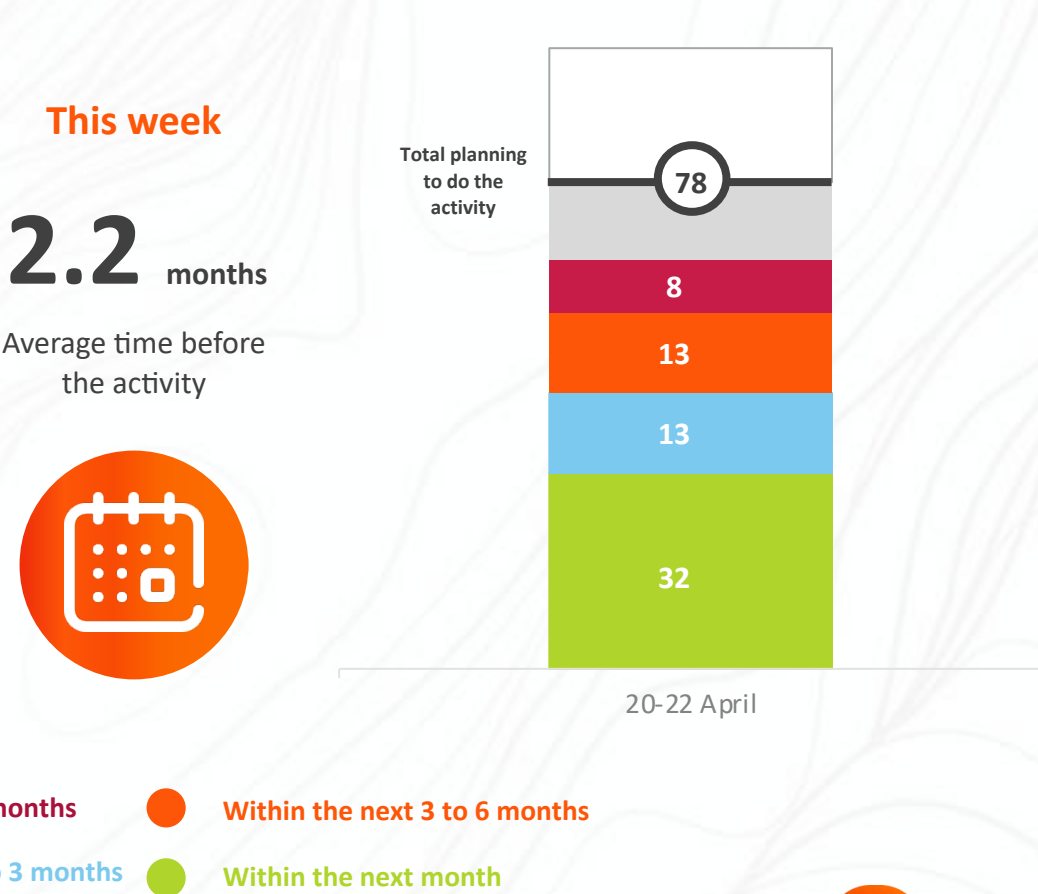
# The proportion planning to go to a visitor attraction is at its highest in five weeks

Aligned with UK domestic holidays, there is an increasing appetite amongst Britons to go to a visitor attraction - overall intention and the proportion expecting to do so in the next 6 months both at their highest levels in the last 5 weeks. Continued lockdown is clearly prompting Britons to think about a return to varied out of home activities, and visitor attractions have a strong role to play. Online content provides a meaningful stopgap for some (if not all) Britons, a third anticipating to view content in the next month.

## Go on a day out to a visitor attraction



## View online content for a visitor attraction





# Historic Royal Palaces are harnessing the power of nostalgia to raise morale and ensure their attractions remain front of mind



Historic Royal Palaces @HRP\_palaces · Apr 16

For our next LIVE quarantine Q&A tomorrow lunchtime we'll be exploring the world of historic royal fashion and the treasures of our Royal Ceremonial Dress Collection with curator Eleri Lynn

Comment below with your questions and join us here tomorrow at midday!



“Thank you so much for organising this Q&A, and please thank Eleri for her time.”

“So excited!! Which of the modern royal fashion pieces in the Dress Collection is your particular favourite, and which do you think deserves more attention?”

“Thank you HRP; really looking forward to a super session from another of HRP's brilliant curators”



Historic Royal Palaces @HRP\_palaces

What's your favourite #PalaceMemory?

With the palaces currently closed, we're missing #PalacePhoto each week. So we'd love to see and share your favourite photos from previous visits instead! Share with us using #PalaceMemory and we'll feature a selection each weekend

“Replying to @HRP\_palaces

Thank you for your time Hugging face I know we've all learnt new info today Grinning face with smiling eyes I've just enrolled on the course. So excited”

“#PalaceMemory SO many to choose from (I'm a Member too!) LOVED Queen Victoria's floral spruce up for her 200th Birthday at Kensington Palace in 2019! The amazing gardens there too! And at Hampton Court Palace, some of Henry VIII's wife's get together for a natter!”

Or... #PalaceMemory of our incredible rooftop tour of Hampton Court Palace, beautiful day with fantastic staff.

#PalacePhoto



# Overall desire to visit the gym and the cinema remain constant after last week's rise

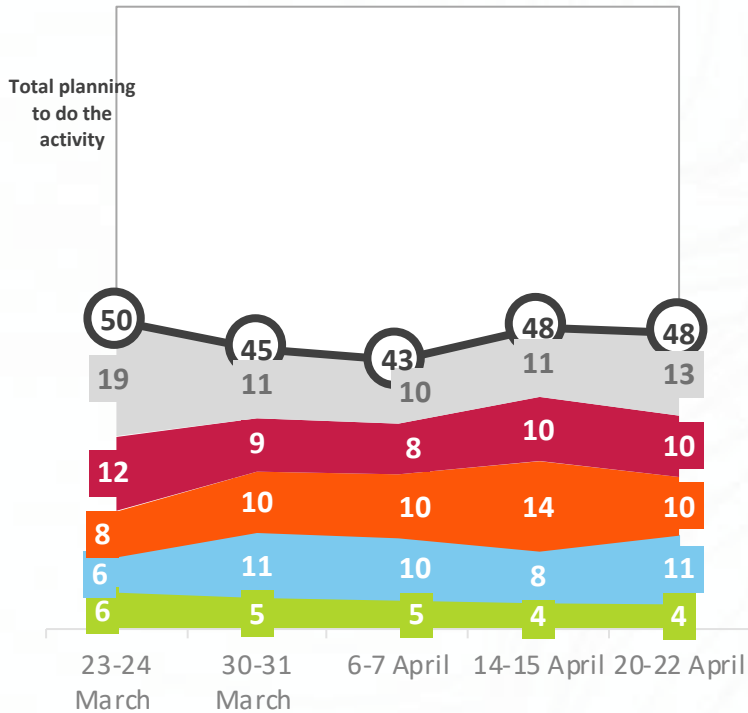
A consistent 1 in 4 Britons anticipate visiting the gym within the next 6 months, rising to around 2 in 5 visiting the cinema. With easy access to in-home or out-of-home alternatives, organisations in both sectors will need to remain front of mind to ensure their customers return to their old (rather than new) habits when the lockdown is lifted

## Go to the gym

**This week**

**4.5** months

Average time before the activity

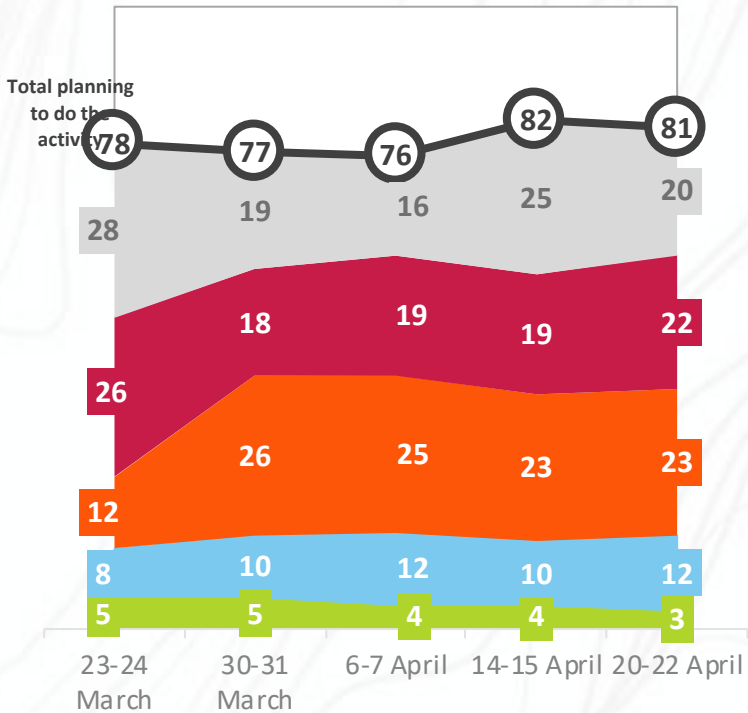


## Go to the cinema

**This week**

**5.4** months

Average time before the activity



- Planning on doing it but don't know when
- Within the next 6 to 12 months
- Within the next 3 to 6 months
- Not planning on doing it
- Within the next month to 3 months
- Within the next month



# Intention to eat out and shop in the next 3 months are both at their highest

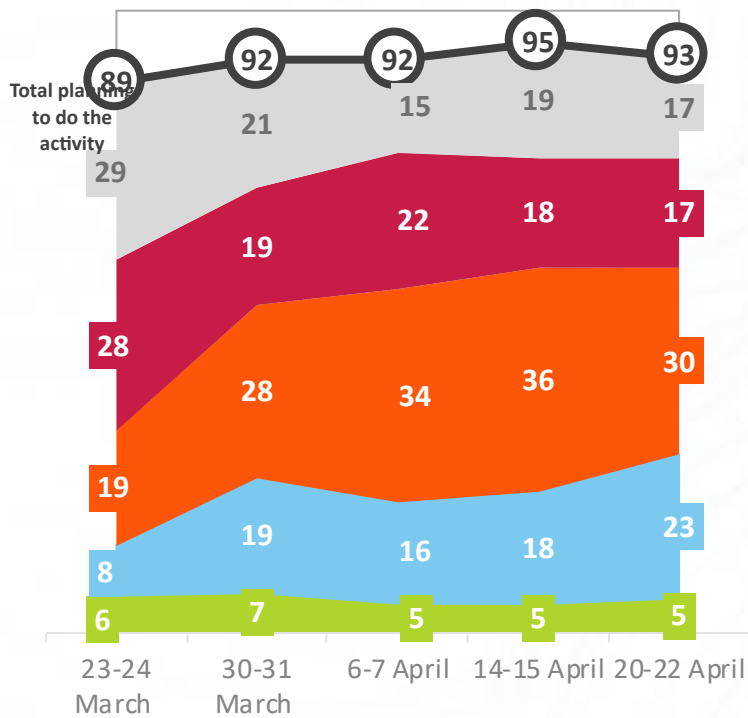
Around 3 in 10 intend to visit a restaurant and a third intend to go shopping in the next 3 months. The desire to engage in these activities, despite multiple online alternatives, underlines the importance of ‘experiences’, as well as ‘products’.

## Go to a restaurant

**This week**

**4.5** months

Average time before the activity

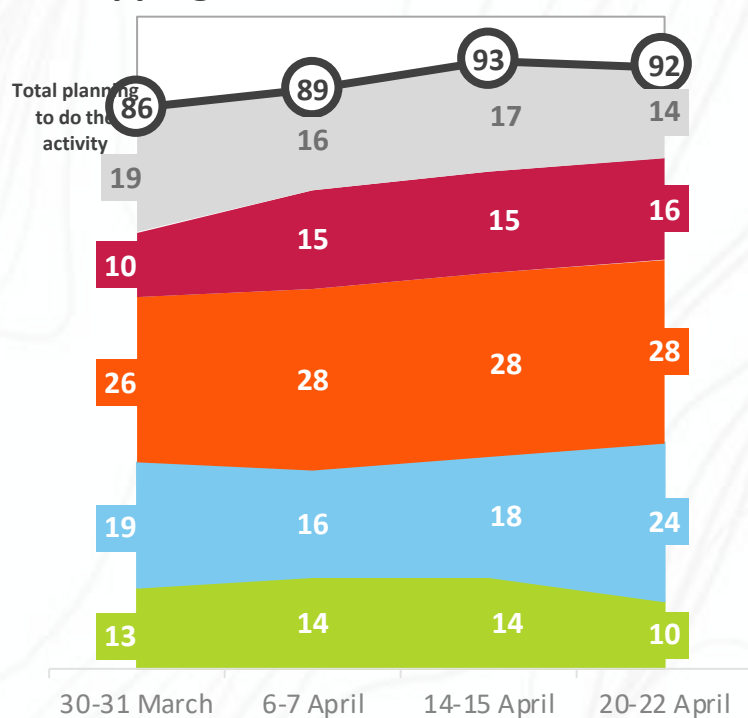


## Go shopping or to a shopping mall\*

**This week**

**4.1** months

Average time before the activity



- Planning on doing it but don't know when
- Not planning on doing it
- Within the next 6 to 12 months
- Within the next month to 3 months
- Within the next 3 to 6 months
- Within the next month

# When do respondents expect to book hotel accommodation again?

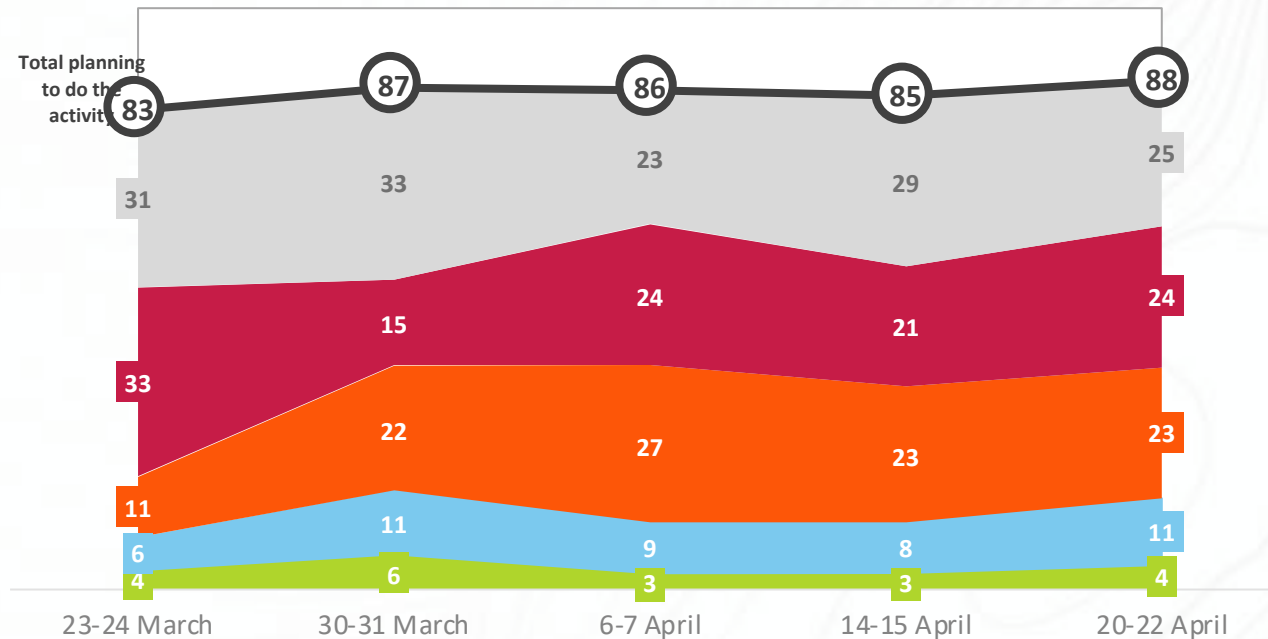
- Another week with little significant change in respondents' expectations regarding hotel accommodation, although it's important to bear in mind that fieldwork was conducted before Professor Chris Whitty's comments regarding the anticipated length of the UK lockdown\*.

## Book hotel accommodation

This week

5.5 months

Average time before the activity



- Not planning on doing it
- Planning on doing it but don't know when
- Within the next 6 to 12 months
- Within the next 3 to 6 months
- Within the next month to 3 months
- Within the next month

Q11. Which the following are you intending to do in the next 2 weeks combined with Q12. Given what you know today, when do you anticipate doing the following? Base all

\*<https://www.bbc.co.uk/news/uk-politics-52389285>

# On social media – hospitality – Reactions to top hoteliers



Marriott International Launches Global Cleanliness Council to Promote Even Higher Standards of Cleanliness in the Age of COVID-19

“Actions by @Marriott , @Accor & @bureauveritas for hospital grade facilities cleaning are impressive.”

“So proud of Marriott's commitment to its people and guests”

“A great initiative and 'BV' are used by the Cruise Industry for certification. Being verified/certified is only part of the process the biggest element is that actual maintenance and ensuring standards are maintained each and every day”

“I am Accor member, it is good what the hotel chain is doing and keeping the hotel clean all times.”

**Hilton and American Express donate up to 1 million free nights for medical workers**

“The room donation would be welcomed relief for the thousands of medical staff enduring long hours under challenging circumstances.”

“A very generous and significant action from always great Hilton Worldwide Holdings Inc. and American Express Company for the devoted and brave frontline medical staff”

# Future booking – what are the plans now?

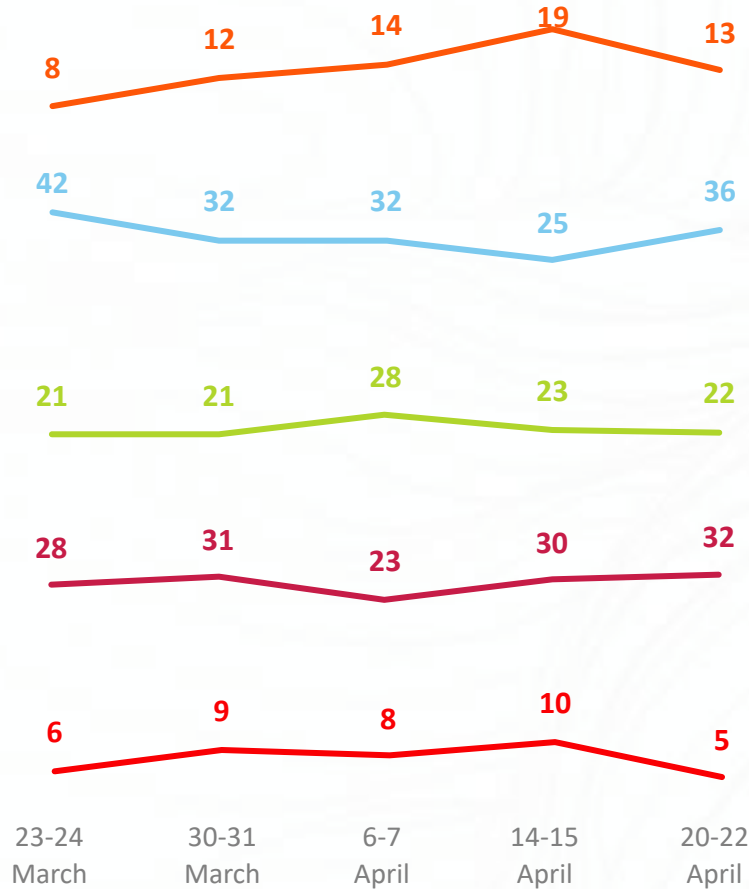
To proceed and take my booked accommodation, holiday, or flight

I postponed my booking to a later stage

My booking is cancelled, I am planning on booking a replacement

My booking is cancelled, I have no plans to book a replacement

Other (please specify)



- Perhaps as a response to the extension of the lockdown, there's a decline in the proportion intending to proceed with their plans and an even steeper increase in those who have postponed
- A second week of increase in the "no plans to book a replacement" (now at a record high) mirrors a second decline in those "planning on booking a replacement" (now just 1pt above where it started)

“Hoping to go as it's later in the year but don't know for sure”

“My booking is for a birthday present in November”

“Cancelled accommodation ( pay on arrival ) and had to forgo flight personal choice not to go in March”

“Currently the attraction is adopting a wait and see (the festival is at the beginning of August) if cancelled they are carrying the same cites forward to next year anyway”

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? (%)



# Transport



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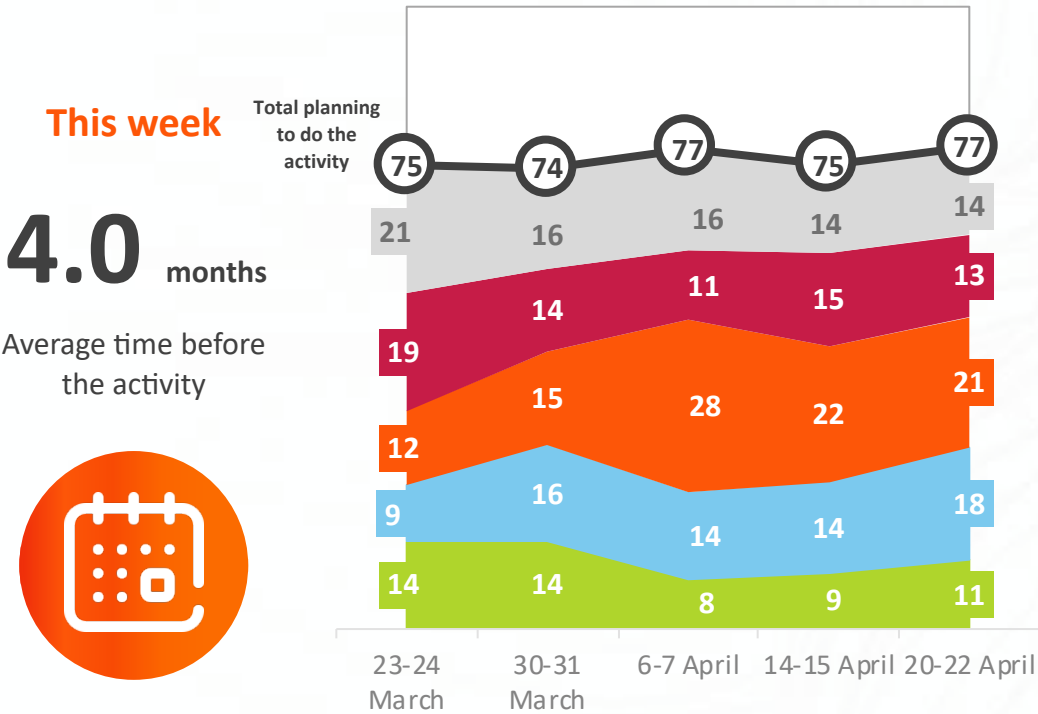




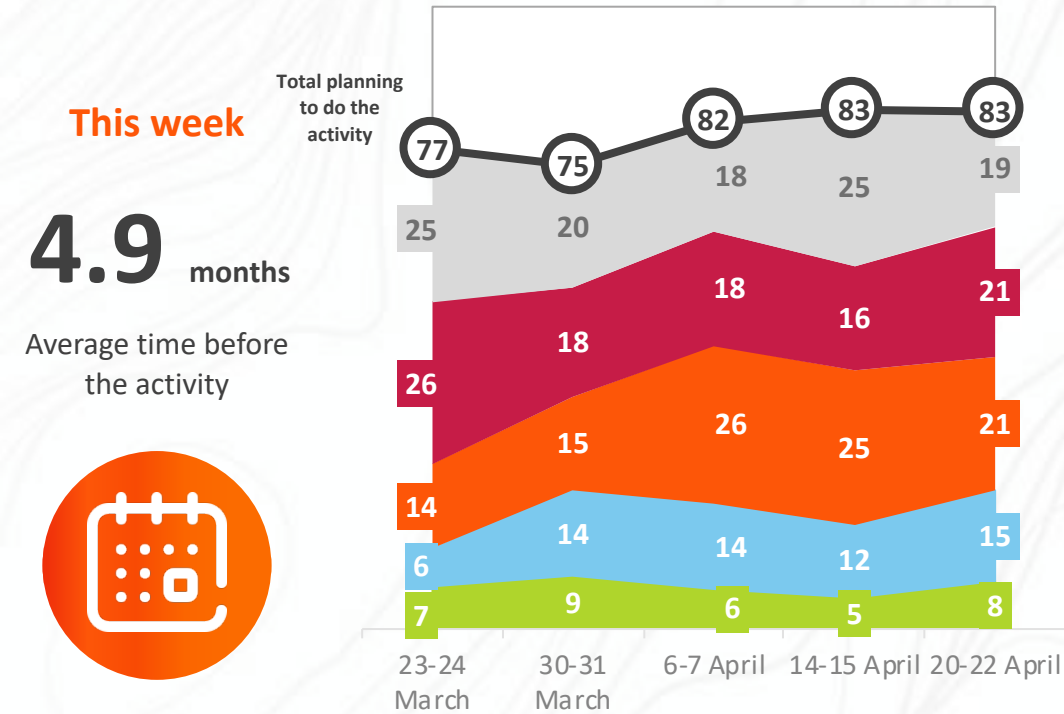
# Perhaps linked to improved prospects for domestic leisure and tourism, there is also a growing intention to use bus and rail services within the next 3 months

- More people are planning to take the train than the bus, but when they will do that is still uncertain as predicted usage still fluctuates week on week.

## Take the bus



## Take the train



- Planning on doing it but don't know when
- Within the next 6 to 12 months
- Within the next 3 to 6 months
- Not planning on doing it
- Within the next month to 3 months
- Within the next month

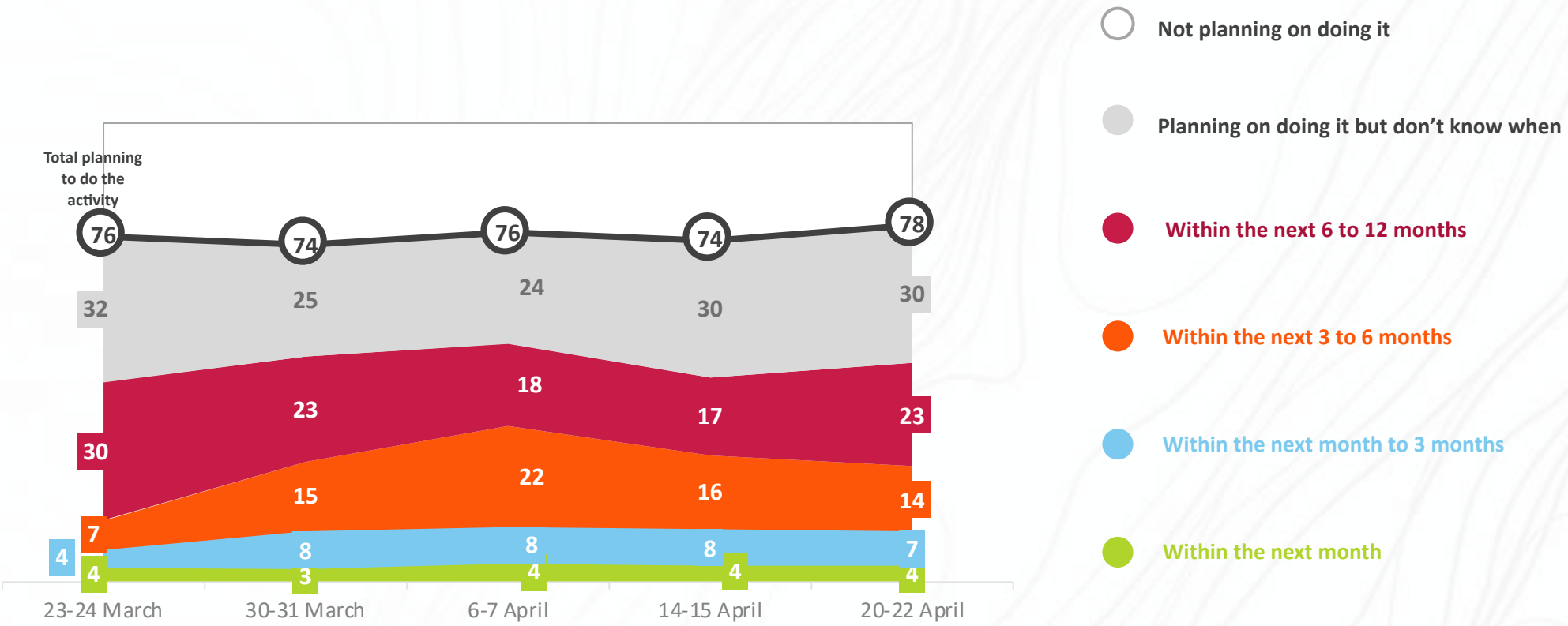

# For airlines, intention to fly is at the highest since the start of tracking, but prospects for increased engagement in the next 6 months continue to recede

Book a flight

This week

6.0 months

Average time before the activity



However, the data reveal a continued decrease for the past 3 weeks in the number of respondents planning to fly in the next 6 months. Airlines will have some immediate difficult times, but those still operating in the next 6 months should come out stronger as intention to fly is improving and fuel prices are at their lowest

# On social media this week – Long-haul airlines – (1)



- On social media BA once recording high Net Sentiment is now in the negative as frustrated passengers complain about cancelled flights and their challenges in receiving refunds for their tickets.

**March 10<sup>th</sup>**

British Airways cancels all flights to/from Italy.

**March 30<sup>th</sup>**

Other airlines such as British Airways and Jet2 have cancelled the majority of their flights, running repatriation flights to stranded travellers abroad

**April 16<sup>th</sup>**

ITS BEEN OVER 30 DAYS, PLEASE REFUND MY \$2604!! @USDOT Ive called, emailed, and @British\_Airways is not replying!! please help!

**April 16<sup>th</sup>**

@British\_Airways so angry with you over flight cancellation email - it states to go to Manage my Booking then, once booking ref entered, states a voucher will be sent. I DON'T WANT A VOUCHER - I want a refund!!

**April 17<sup>th</sup>**

@British\_Airways you just cancelled my flight. That's ok in current circumstances but to get a refund I have to call the call centre - which is closed !!.

**April 20<sup>th</sup>**

@British\_Airways @BBCWatchdog @MartinSLewis Flights cancelled, given a voucher to be used in next 12 months. Tried several times to email/phone without success as I want a refund. We will not be-able to use this voucher. #BritishAirwaysrefund #poorcustomerservice

**April 19<sup>th</sup>**

@British\_Airways You've cancelled my flight and I am trying to call to get my money back. I do not want a voucher. But your call centres are shut.

**April 17<sup>th</sup>**

Some customers felt frustrated by British Airways' and easyJet's decision to remove their cash refund buttons on their websites.

**April 20<sup>th</sup>**

Hi there, British Airways has cancelled my flight and I would like a refund. They do not answer the phone and it seems like they put in place a method to obstruct us to get the refund.

**April 20<sup>th</sup>**

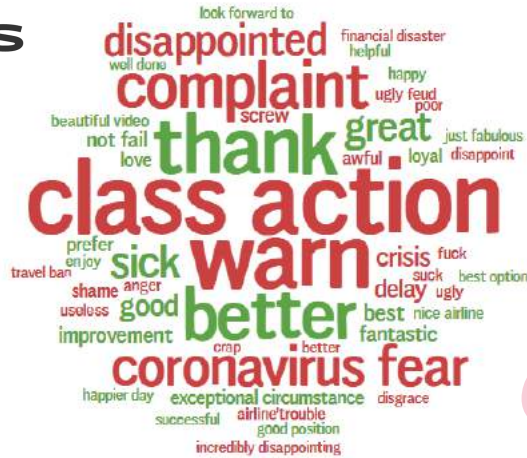
Right.... This is silly @British\_Airways You have MY £3.2k for flights to Barbados! You cancelled! This was for my wife's 50th birthday & my daughters wedding! Something we had planned for over 10 years!



# On social media – Long-haul airlines – (2)



Net Sentiment



**March 30<sup>th</sup>**  
 “@qantas is incredibly disappointing. Stranded in Sydney after they sent multiple emails to cancel my flight. I followed their instructions and now am stranded... with no information and just automated”

- This is a sector-wide issue as other airlines such as Qantas and Etihad are also facing anger from their passengers over refunds and perceptions around the protection of frontline staff

**April 14<sup>th</sup>**  
 “QANTAS is by far one of the better placed airlines in the world to weather this pandemic and it is hardly in a position where it could inject cash into another flailing airline overseas.”

**April 12<sup>th</sup>**  
 “Qantas staff consider class action alleging airline failed to protect them against #COVID19”

**April 12<sup>th</sup>**  
 “I’ll never fly @Qantas again. For two economy flights from Sydney to PERTH middle of a pandemic when the only please flying will be those in desperate circumstances, attempting to charge nearly \$4000 is disgusting. I am so disappointed in @qantas”

**April 16<sup>th</sup>**  
 “Authorities are warning Queenslanders after a passenger on a packed Qantas flight from Sydney to Brisbane on Monday has been found to have been infectious with Covid-19.”

**April 19<sup>th</sup>**  
 “@etihad flights cancelled three times and apparently no chance of a refund to buy another ticket home. Disgusting is an understatement.”

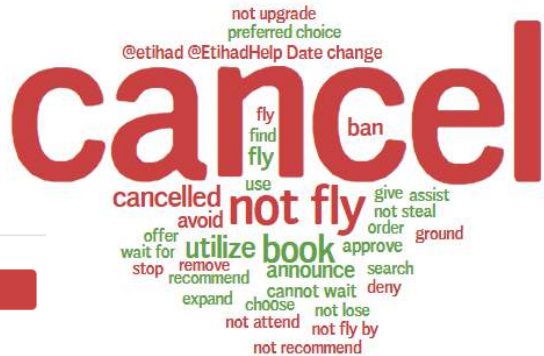
**April 20<sup>th</sup>**  
 “@EtihadHelp why I am not getting a refund of flight trip that I had to cancel due to CORONAVIRUS pandemic? I’m being asked to replan the travel for some time within a year to get credit!! why can’t you do that when others like Emirates have done this?#etihadairways”

**April 2nd**  
 “@EtihadHelp India is literally CLOSED DOWN, and UAE is suspending all flights, but you won't refund my ticket?? We're in the middle of a WORLDWIDE VIRUS PANDEMIC. People literally have no choice but to not take their flights.”

**April 5th**  
 “When we come out the other end I strongly advise you avoid @etihad Trying to get our Tom home from NZ they have been unhelpful, opportunistic and are retaining money from flights THEY have cancelled. You have to re book by Sept or lose your £’s Disgraceful 😡”



Net Sentiment



# On social media – Long-haul airlines – (3)



- Cathay Pacific follows the same path as BA and most other major long haul airlines.
- Singapore Airlines on the other hand records significantly more positive sentiment.

**March 25<sup>th</sup>**

“It's trying times for everyone - both customers and airlines. I would like to thank Singapore Airlines for responding to me despite the challenging circumstances”

**March 25<sup>th</sup>**

“this recent flight was such an excellent flight that I have have to submit this review. Had to change my flight dates due to COVID-19. Customer Service over the phone was exceptional.”

**April 14<sup>th</sup>**

“Singapore Airlines offers refunds for flight disruptions over coronavirus. Passenger can retain the full value of the unused portion of their ticket as flight credits.”

**March 17<sup>th</sup>**

“Thank you Singapore Airlines for waiving rebooking and change fees on our upcoming flight when our cruise was cancelled. We appreciate the great customer service!”

**April 6<sup>th</sup>**

“I'm so proud of Singapore Airlines. They have decided to deploy their cabin crews to fill in roles in the hospital because of shortage of manpower. Amazing. Planes are grounded and cabin crews have skills like first aid and customer care 🥰🥰”

**March 12<sup>th</sup>**

“After taking advise from both the UK and Chinese Government with regards to our forthcoming flight from HongKong to Japan for the first week of May, we made the hard decision to cancel our dream holiday. Contacting customer service to cancel, I was shocked to hear that we would be charged \$2,200 HKD as this cancellation was our choice.....”

**March 30<sup>th</sup>**

“Such poor customer service from @Expedia! Shocked and disgusted @cathaypacific cancelled my flight and have issued a global refund policy that clearly mentions Expedia booking but Expedia is saying they don't have any directive regarding refunds yet! This is beyond ridiculous”

**April 8<sup>th</sup>**

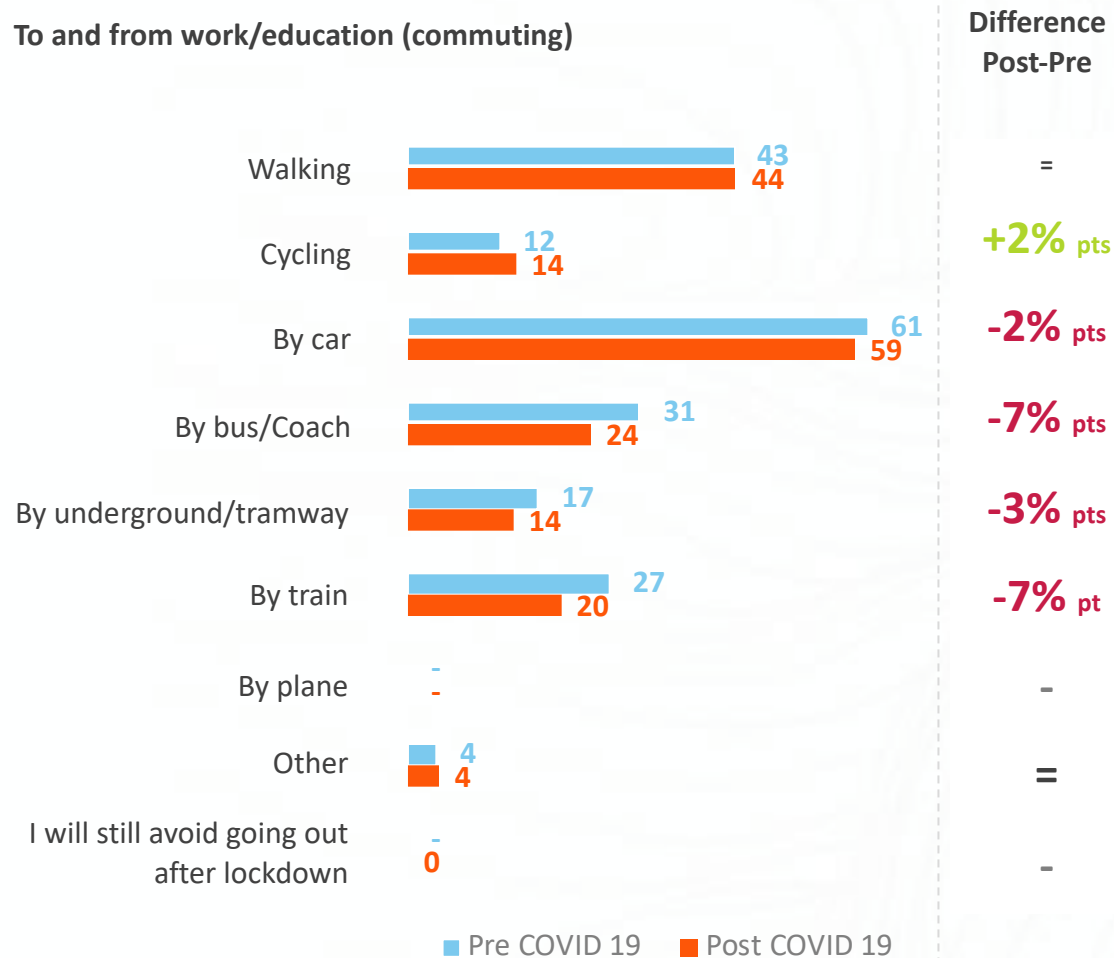
“I m waiting for my refund of a flight canceled by @cathaypacific...I spent a fortune calling you with no answer!”



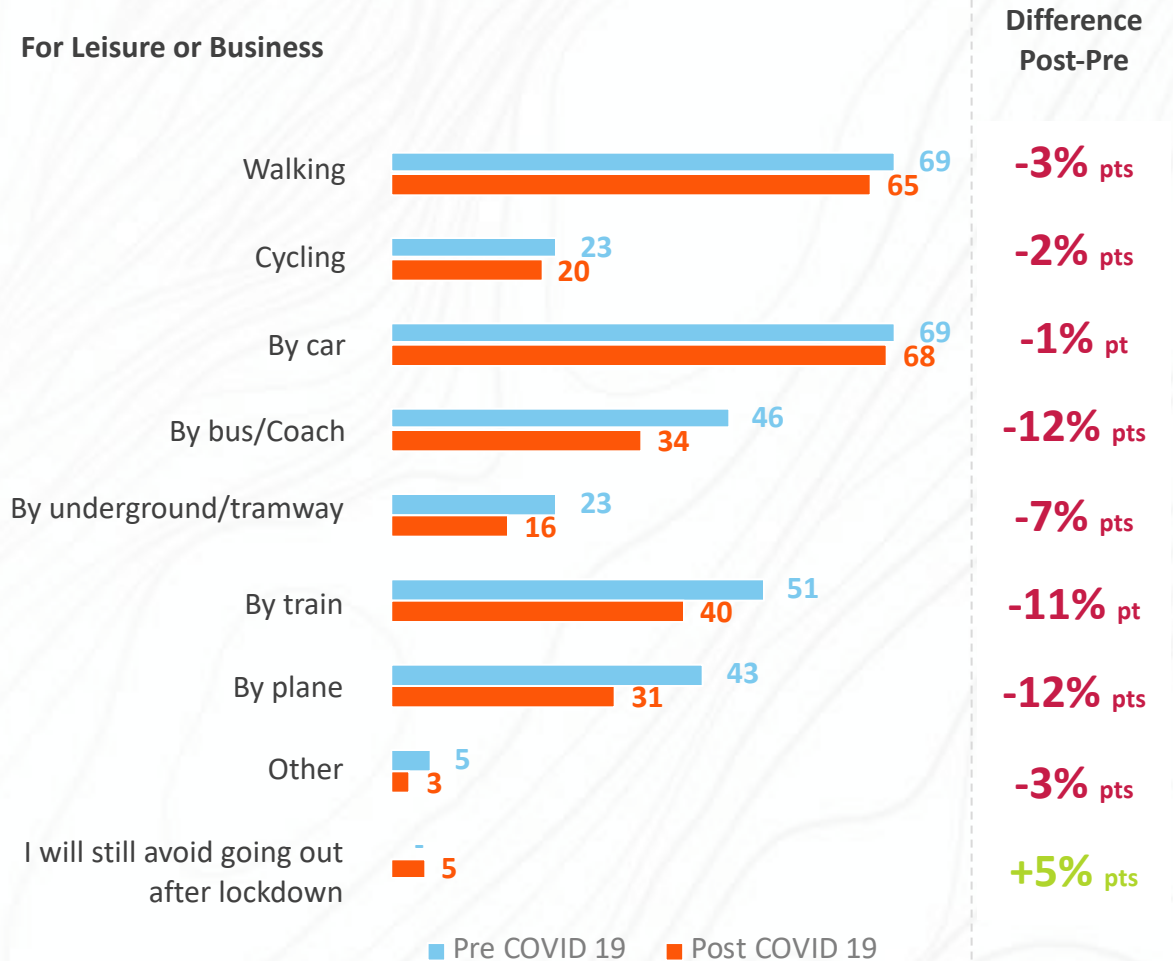
# Usage of transport post lockdown

- Expected usage of transport after the lockdown for commuting is down for all modes especially for the bus and the train. Commuters are planning to increase slightly their usage of bikes to get to and from work/education.
- For leisure and/or business trips, these are all predicted to go down as 5% of the population will avoid going out after the lockdown. The largest drop in usage are for air, bus and train travel.

## To and from work/education (commuting)



## For Leisure or Business



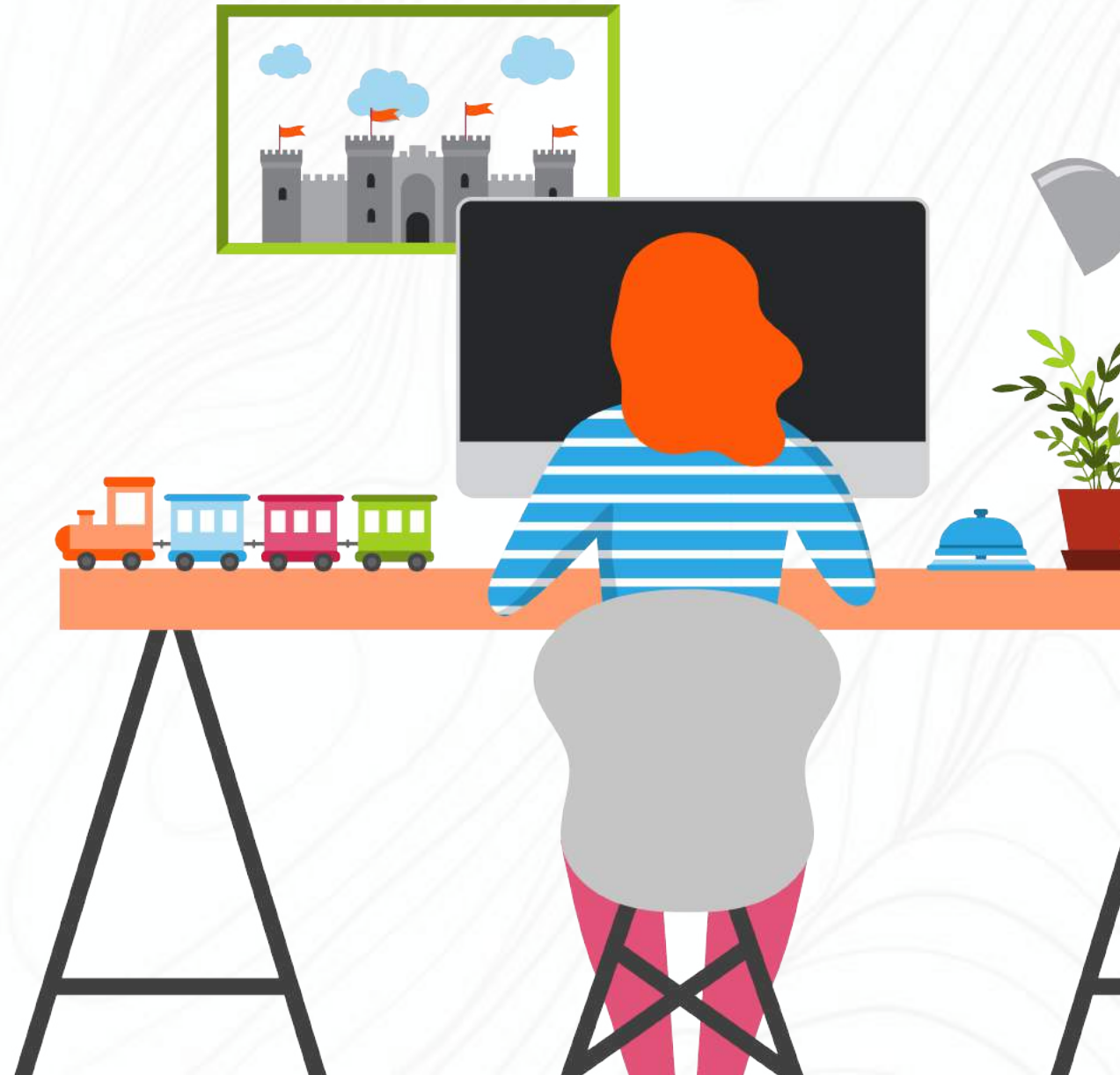
Q41: Before the coronavirus, how did you tend to travel...

Q42: After lockdown has ended, how do you expect to travel ...

# Appendix



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# 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.

This is a weekly survey capturing 500 respondents per wave\*.

This week we exceptionally surveyed 897 respondents



*Remember that this is also an opportunity for you and your organisation to add specific questions or to increase the number of respondents targeting your customers or specific segments. To do so, please get it touch!*

## 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 for the past week.

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

- 67,252 posts for the transport sector
- 17,743 posts from the leisure sector
- 15,267 posts from the hospitality sector
- 8,061 posts from financial sector

# Methodology – Business questions

## 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 majority of questions were answered by 1064 businesses- 544 in week 1 of fieldwork and 520 in week 2. 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	199
£1-5m turnover	286
£5m+ turnover	579

### Sample sizes by age of business

Trading <5 yrs	180
Trading 5-20 yrs	538
Trading 20+ yrs	394

### Sample sizes by sector

Manufacturing	305
Retail Distribution	261
Services	498

### Sample sizes by region

North	252
Midlands	180
South	447
Devolved nations	185



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