

Tracking Consumer Sentiment on the Impact of COVID-19

Travel & Mobility, Leisure & Hospitality

Personal Finances

Weekly Update – 18th May 2020



ALLIGATOR

Introduction

This weekend UK Prime Minister, Boris Johnson, acknowledged the public's 'frustration' as criticism grows over the government's strategy for easing COVID-19 lockdown. It's not been a good week for the government; in common with nationally-representative opinion polls, our research among a travel-focused audience suggests a significant loss of confidence in its handling of the crisis.

Beyond apparent confusion with mixed messages around the lifting of lockdown, policies such as the 14-day quarantine period for inbound air travellers seem certain to inflict further damage upon the already ravaged aviation and international travel sectors. This is borne out by our report this week, which shows a significant lengthening of lead-times to travellers' next flight and international holiday booking.

And it is not only in the realm of international travel that the challenges are mounting. This week we record the lowest intention yet to use bus services, with a sharp downturn in usage intentions also recorded for rail services. While some workers are now faced with the necessity of travel, those with a choice are far from clear as to how social distancing will work on a rush-hour bus service or railway platform.

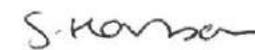
If the immediate financial implications of this crisis were not already grave enough for the UK's major travel businesses, they also have to manage the lens of public scrutiny – both in terms of how they are treating customers and staff. In this week's report, we show that there is a clear 'gap' between what customers want when it comes to cancellations (generally, full cash refunds) and what they often get. Meanwhile, treatment of staff has also come back into the spotlight: at the time of writing, the Unite union's video message to British Airways has been viewed nearly 300,000 times on YouTube since the 9th May, with 2.6K thumbs up to 74 thumbs down. The balance of sentiment on social media is rarely an accurate indicator of the entire population, yet no brand should underestimate the long term reputational impact of being perceived to be 'getting it wrong'

Next week we will be back with an update on business opinion, as well as some detailed analysis on the prospects for the live events market.

Stay tuned and stay safe!



Matt Costin
Managing Director, BVA BDRC



Suzy Hassan
Managing Director, Alligator Digital

Executive Summary

This week we report the first significant change in direction when it comes to public opinion on the crisis. Our travel-focused, national sample has so far been broadly confident in the government's handling of the emergency and from week-to-week we have recorded an improving position in terms of more people sensing that we are getting through the crisis. But the government's recent announcement on the re-opening of society has 'frightened the horses' and, for the first time, we see some reversal of the positive trend.

Despite this evident public unease with some aspects of the strategy to re-open society, intention to plan and book a UK holiday rises to a new high since the start of tracking, with average lead times also shortening from last week. Before destinations and accommodation-providers get too excited, however, the typical lead-time for actually taking the UK holiday is over 6 months! While a short-term, post lockdown boom in demand for staycations cannot be ruled-out, intention to take a UK summer break remains significantly lower than normal.

Intention to plan and book an overseas holiday also rises to a new high since the onset of the crisis. However, the government's proposed quarantine measure for inbound travellers appears to have had an immediate (and negative) impact, with travellers further postponing their travel intentions. Unsurprisingly, the picture is the same for flight bookings, with intention to book a flight, on average, nearly 7 months away. For hotels, it is very much a holding position – and opinion on the relative safety merits of AirBnB / homestay vs hotels in the post COVID age remains sharply divided.....well, at least *some* things never change!

Anticipated lead times to the next day-out at a visitor attraction shorten slightly this week, but with no sign yet of any growth in intention to visit inside the next 3 months – with the notable exception of country parks and scenic areas, for which there is a significant increase in intention to visit within the next month. Those attractions typically associated with larger numbers of people in confined areas (e.g. theme parks and zoos) continue to record the longest lead times (upwards of 6 months).

Despite this week marking a slight lifting of restrictions and a suggestion that restaurants could re-open on the 4th July (if the government's 'five tests' are met), Britons continue to be increasingly pessimistic about when they will next 'dine out'. Plans to return to restaurants and shopping malls within the next 3 months decline week-to-week, reinforcing the sense that some consumers feel that relaxation of restrictions may be premature.

When it comes to discretionary spending power, there are some ominous indications this week. Income and outgoings are both lower now than in comparison to life before lockdown. However, outgoings are expected to return and then escalate more quickly. On average, income is expected to have returned to 'normal' in 6 months' time – but outgoings are expected to be higher by this point. This will cannibalise funds that a number of sectors may be relying upon for recovery. In more severe cases, the financial wellbeing of certain consumer segments may be at risk.

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The mood of the nation



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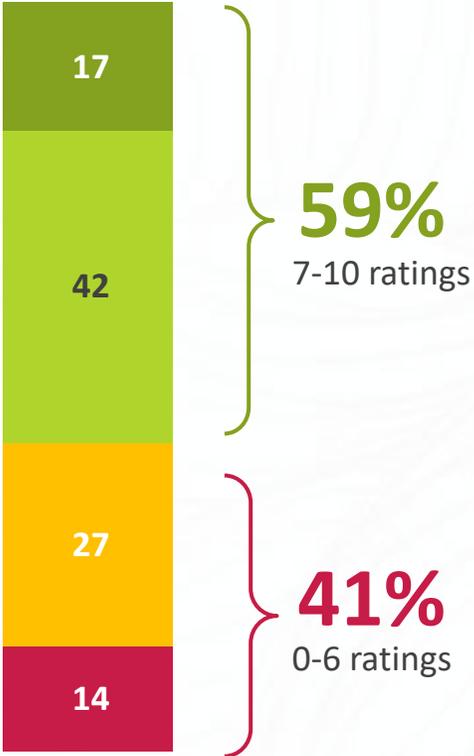


Average mood holds steady this week, with little change in the last month

11-12 May 2020
Average mood
6.7

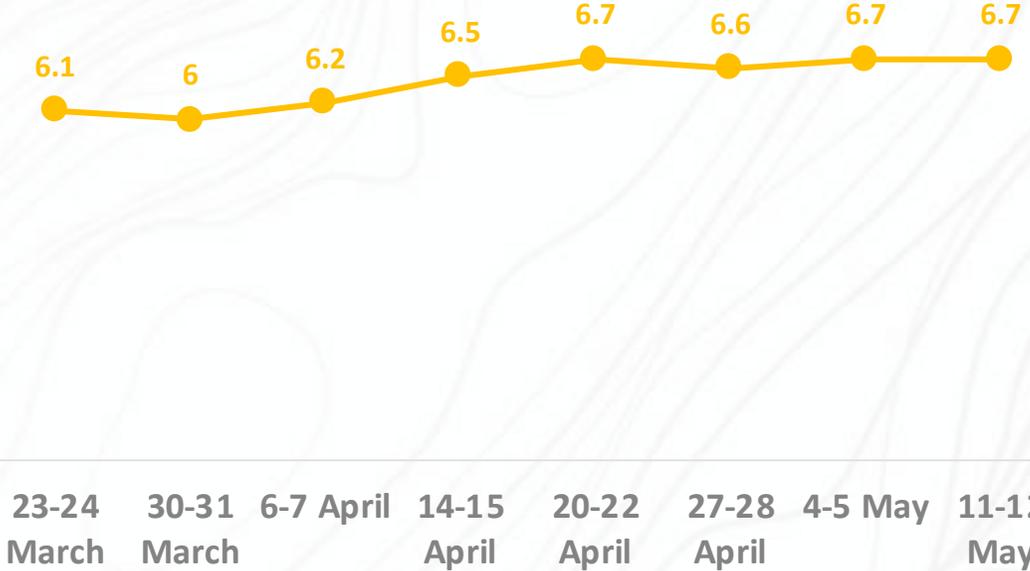


11-12 May



- 9-10 ratings
- 7-8 ratings
- 5-6 ratings
- 0-4 ratings

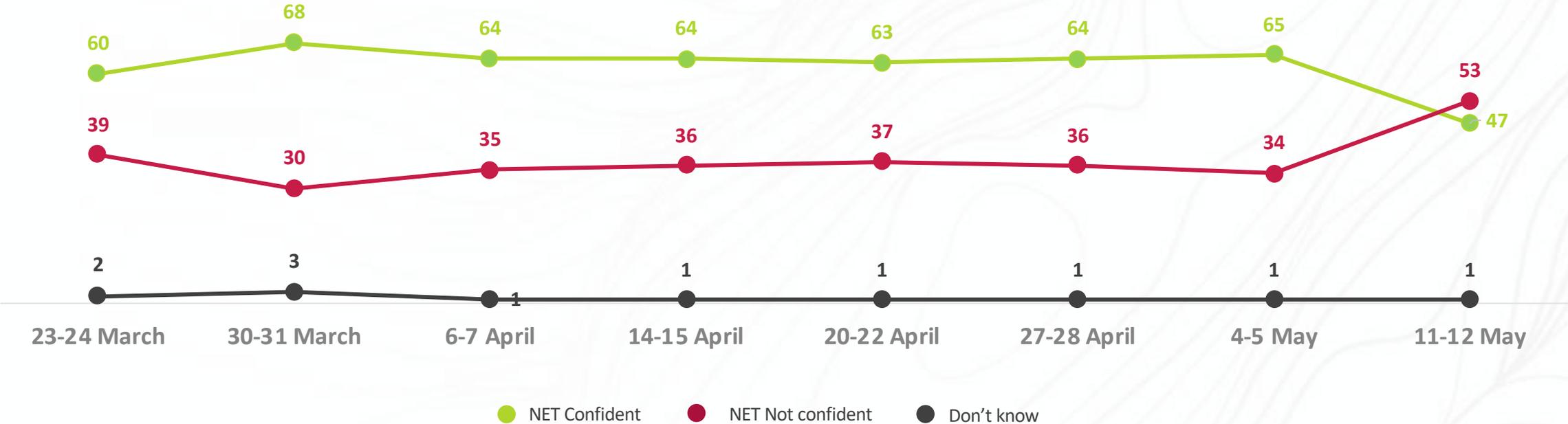
Average mood week-on-week



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

Following last week's national address on the re-opening of society, there is a sharp decline in confidence in the government's handling of the crisis – the majority now say that they are not confident.

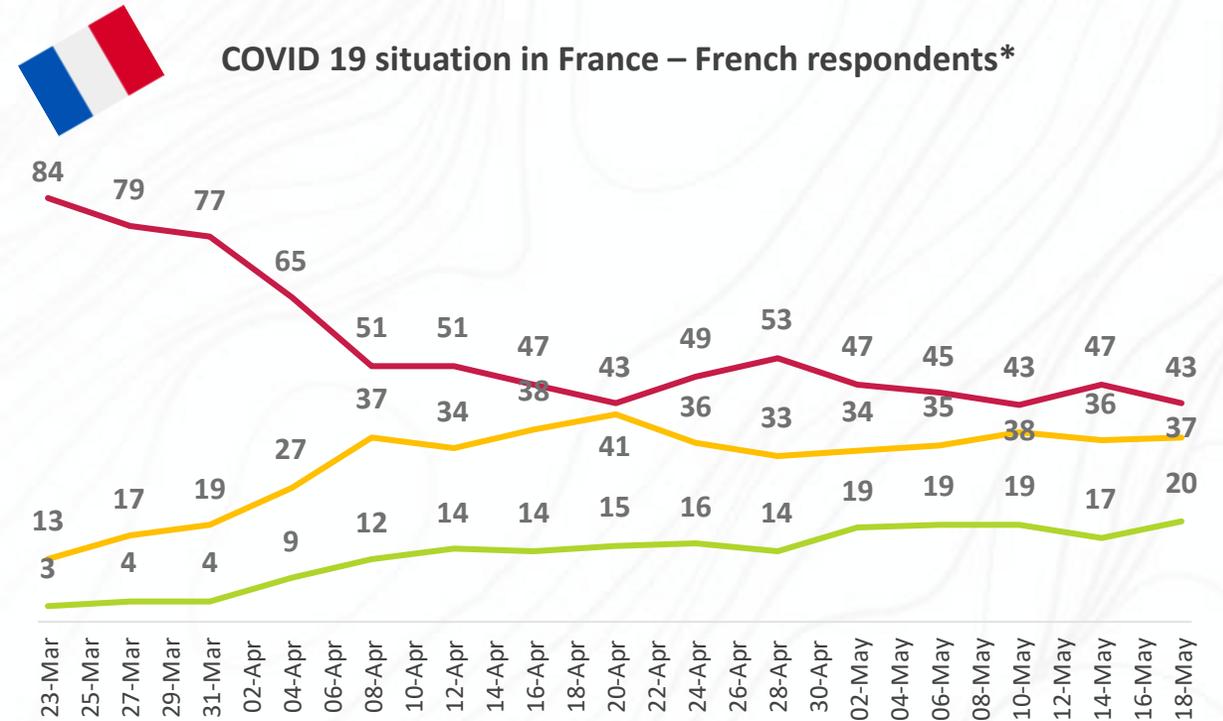
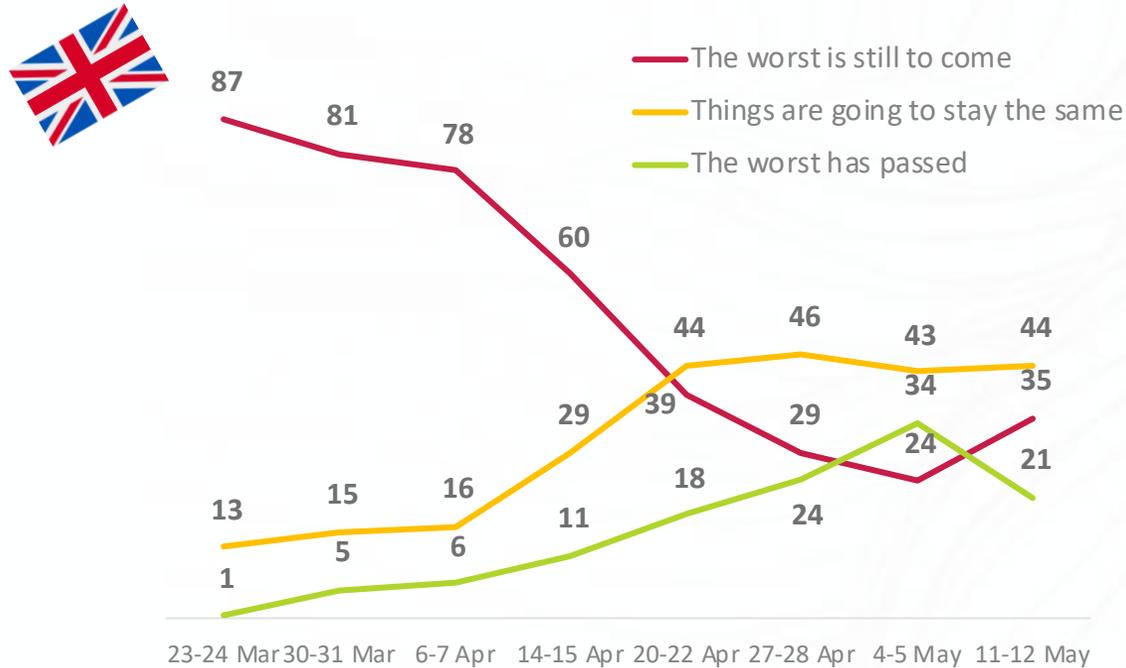
Q6: Would you say that you are completely confident, somewhat confident, not really confident, not at all confident regarding how the British government is handling the crisis? (%)



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? (%)

Several weeks of gradual improvement in outlook towards the crisis comes to a shuddering halt: for the first time since the start of tracking, we report a week-on-week increase in the proportion who fear *the worst is still to come*.

Across the Channel, the proportion of French citizens who believe *the worst has passed* continues to hover under the 1 in 5 mark – but the plurality continue to feel that we have yet to experience the worst of this crisis – despite being a few weeks ahead of the UK in terms of lock-down being lifted.

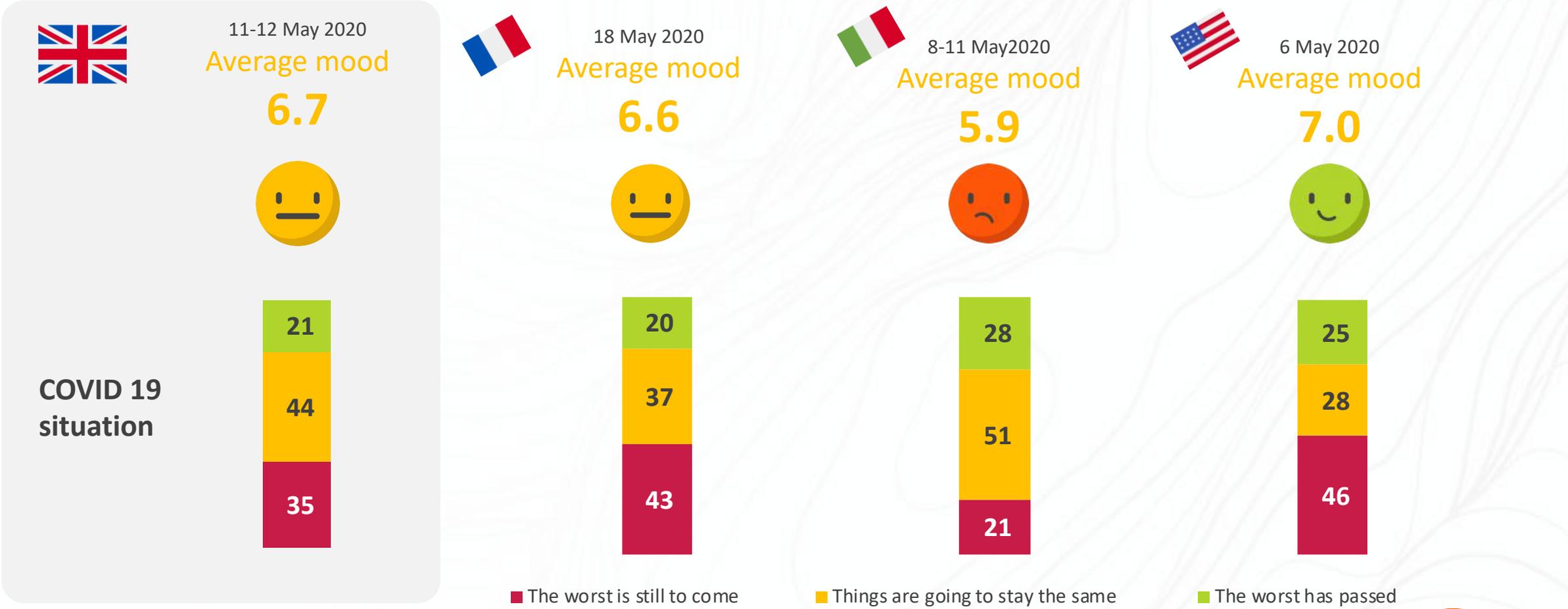


Q7: Regarding the situation of Coronavirus in the UK and the way it is going to change in the coming month, which of the following best describes your opinion? (%)

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

Only 1 in 5 Brits this week think that *the worst is behind us*. Among other nations tracked on the same metric, only France has a less positive outlook (though a higher proportion of Americans fear that the worst is still to come).

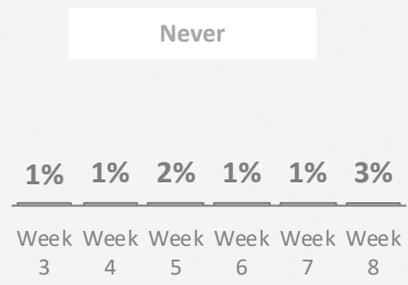
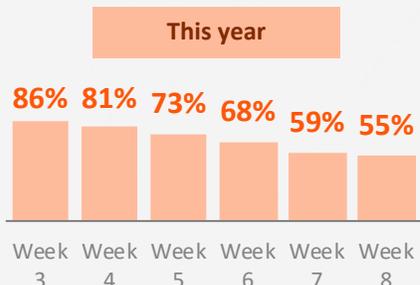
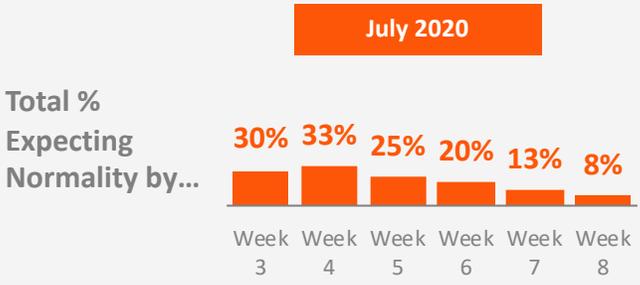
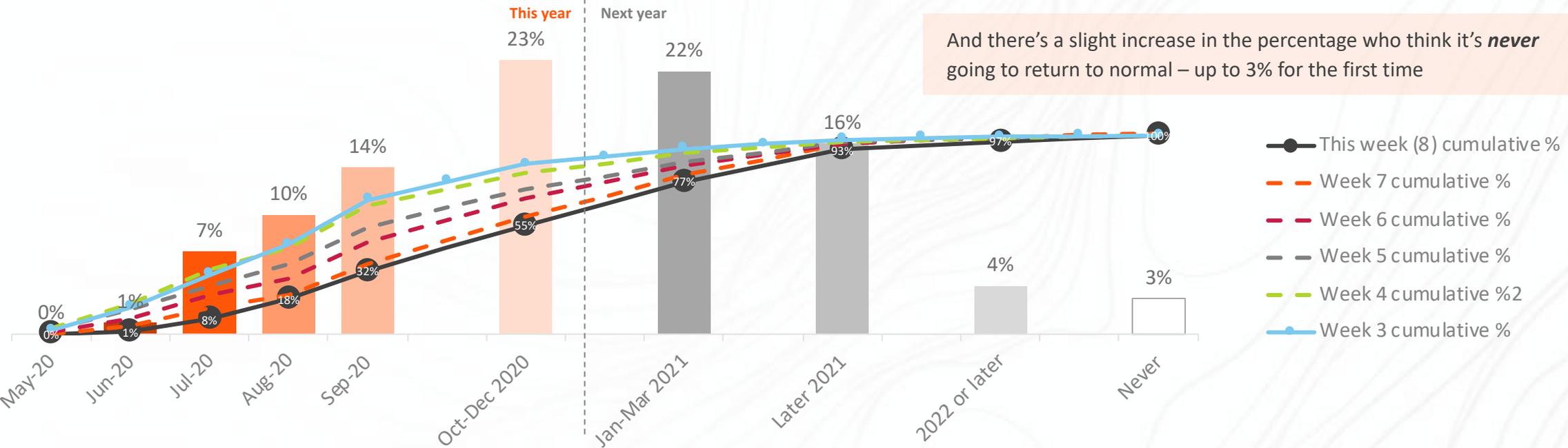
In our most recent update we reported that taking into consideration average mood and the extent to which people feel that the worst has passed or remains ahead, the UK had the most positive outlook of the 4 western countries tracked across BVA Group. The setback this week puts us back into the middle of the pack.



COVID 19 situation

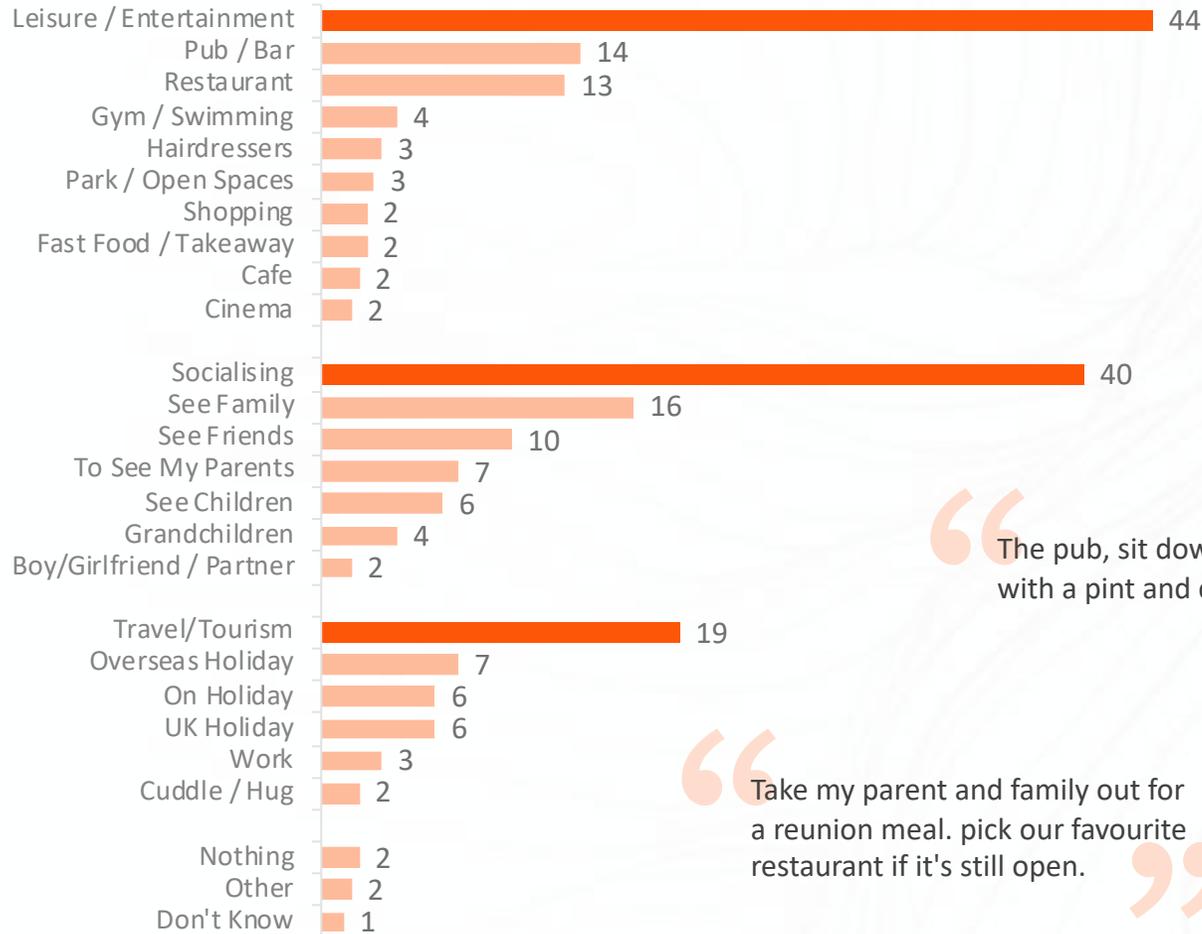
Q7: Regarding the situation of Coronavirus in the UK and the way it is going to change in the coming month, which of the following best describes your opinion? (%)
 Q5: How would you rate, between 0 and 10, your mood today? (%)

As another week goes by, more Brits shift their expectation of normality back into 2021. It's not as big a shift as last week, but now 45% don't expect things to return to normal this year.



An update on priorities after lock-down: seeing family and going to the pub (in that order) are the top priorities!

Spontaneous mentions (%)



“ The pub, sit down with a pint and chill ”

“ I would go to the airport and get on a plane to Thailand for some sun and sandy beaches, nice food, safe place ”

“ I would go out to the park with a few friends to just enjoy the tranquil peace ”

“ Take my parent and family out for a reunion meal. pick our favourite restaurant if it's still open. ”

“ The first place I'd go would be on holiday close to the beach so I could get a bit of a tan. ”

Key themes underlying positive and negative sentiment this week

Complete respect to @AdmiralUK for automatically giving a £25 refund to customers of their car insurance during the #CoronavirusCrisis 😊

Kindness and generosity

@firstdirect you guys are still rocking the customer service despite everything! Big thank you to the team #happycustomer #WellDone

Positive customer service

Sandwich chain Pret A Manager will begin selling three different types of coffee on Amazon from 18 May... The announcement, which marks the first time that customers can make Pret coffee at home, comes as the chain said that more than 100 of its UK outlets would be open for takeaway and delivery from Monday.

Innovation

Blown away by @vueling customer service / experience. Received email offering refund for cancelled flight (scheduled for next month). In 20 seconds (3 clicks from email) I have been issued a refund! 🙌🙌🙌 TBH it's super basic but something @easyJet & others get so wrong!

Positive customer service

I am actually dreading going home on the train tonight .more companies in havant have opened this morning definitely more traffic about.. really not looking forward to it #southernrail

The need for social distance measures

#COVID19 is a pivotal moment for the #Telecoms industry. It's likely to increase public awareness and policymakers' acceptance of how comms tech not only keeps us entertained, informed & in touch, but helps us stay safe.

The future

@jet2tweets my mom is on the critically vulnerable list and has been told not to travel yet you are advising that we still have to pay to move our holiday or cancel and loose our money! Please could you tell us if you have any other options!?! #jet2holidays #COVID19 #coronavirus

Selfishness

Oh dear! There we go then, if you go on holiday just make sure you return via a connecting flight in France. #ridiculous BBC News - Coronavirus: French arrivals exempt from UK quarantine plans

Failing systems

Experience with Covid-19 cancellation



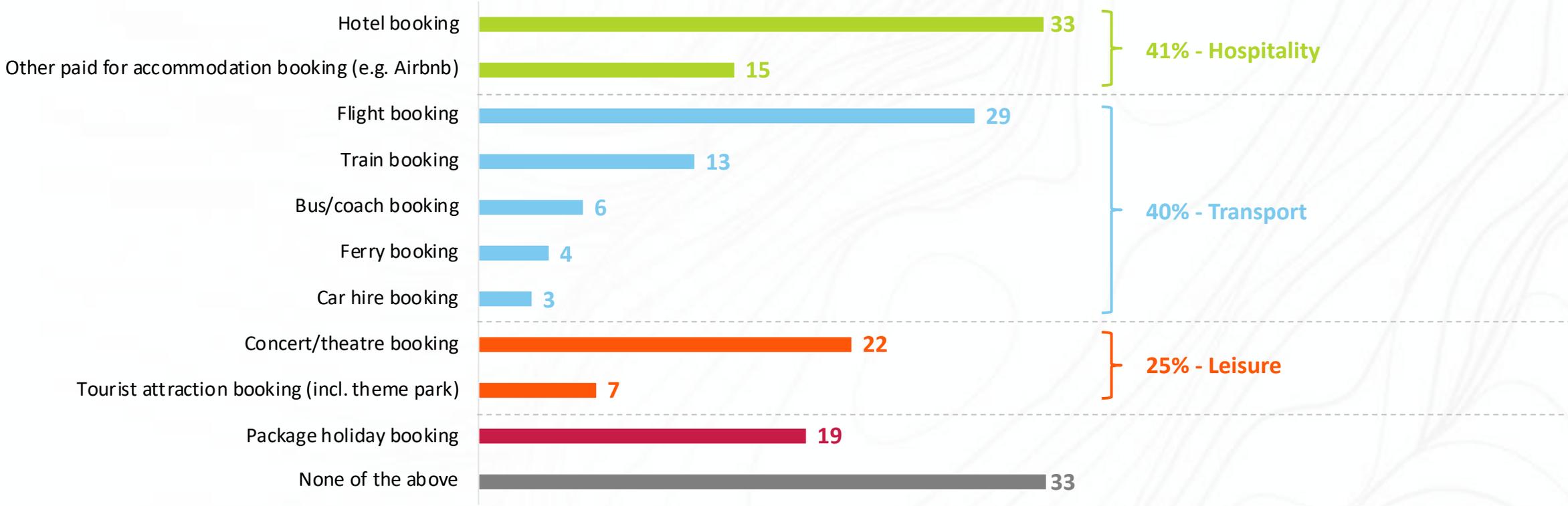
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Exposure to cancellation processes is now widespread among our sample: 2 in 5 have had to cancel their hotel or accommodation booking since the start of the year, and a similar proportion a travel booking.

If the commercial and logistical challenges of managing an unprecedented volume of cancellations was not enough, companies are facing the reality that their customers are increasingly accustomed to cancellation processes and therefore have clearer expectations on what constitutes a positive outcome.

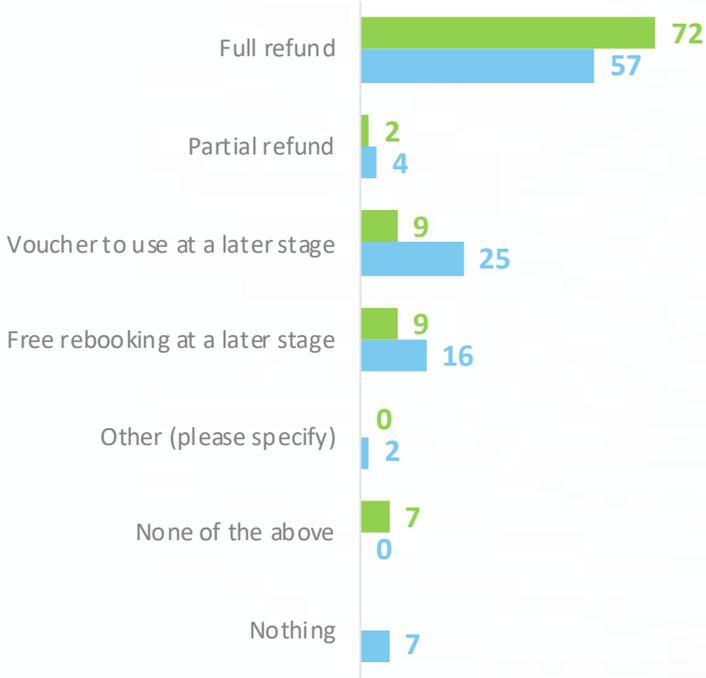
Booking cancelled (%)



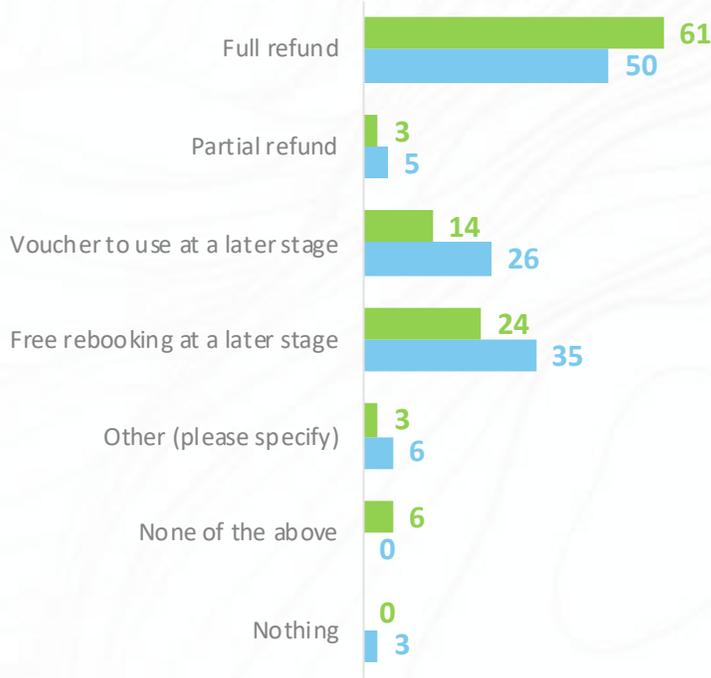
The obvious 'gap' in expectations vs delivery is around refunds. Particularly in the case of transport, the vast majority want a full refund, but only half report getting one. Vouchers and free rebooking are more often offered than wanted!

Compensation wished vs. offered (%)

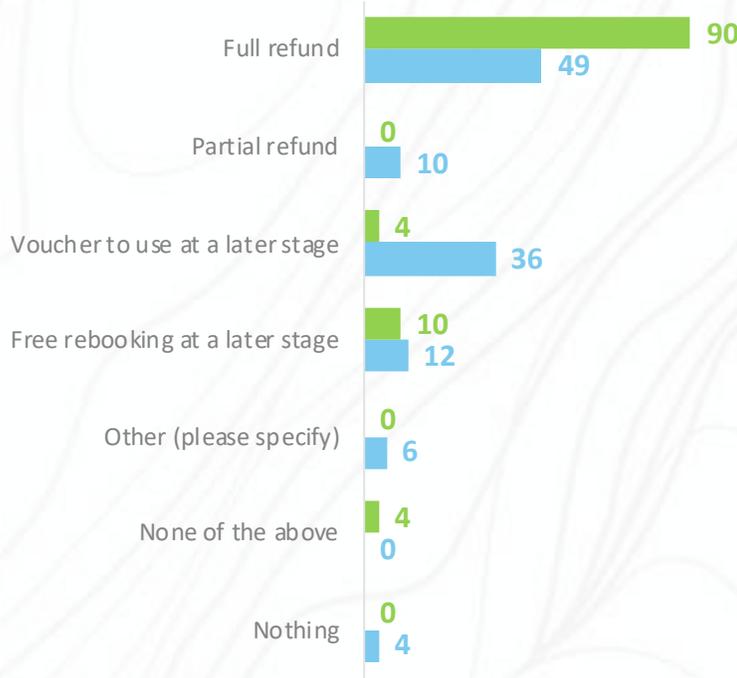
Hospitality booking



Leisure booking



Transport booking



● Wanted ● Was offered

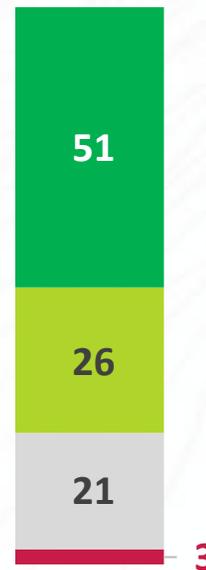
Reflecting the disconnect between expectations / delivery on the question of full refunds, satisfaction with the handling of compensation processes is significantly lower for transport operators, than for hospitality or leisure.

Satisfaction with compensation process (%)

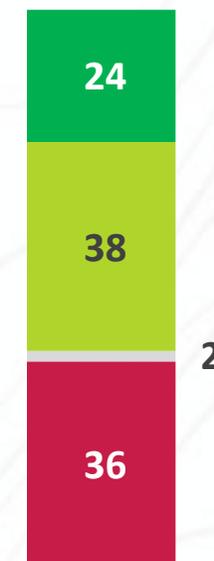
Hospitality booking



Leisure booking



Transport booking



■ Dissatisfied

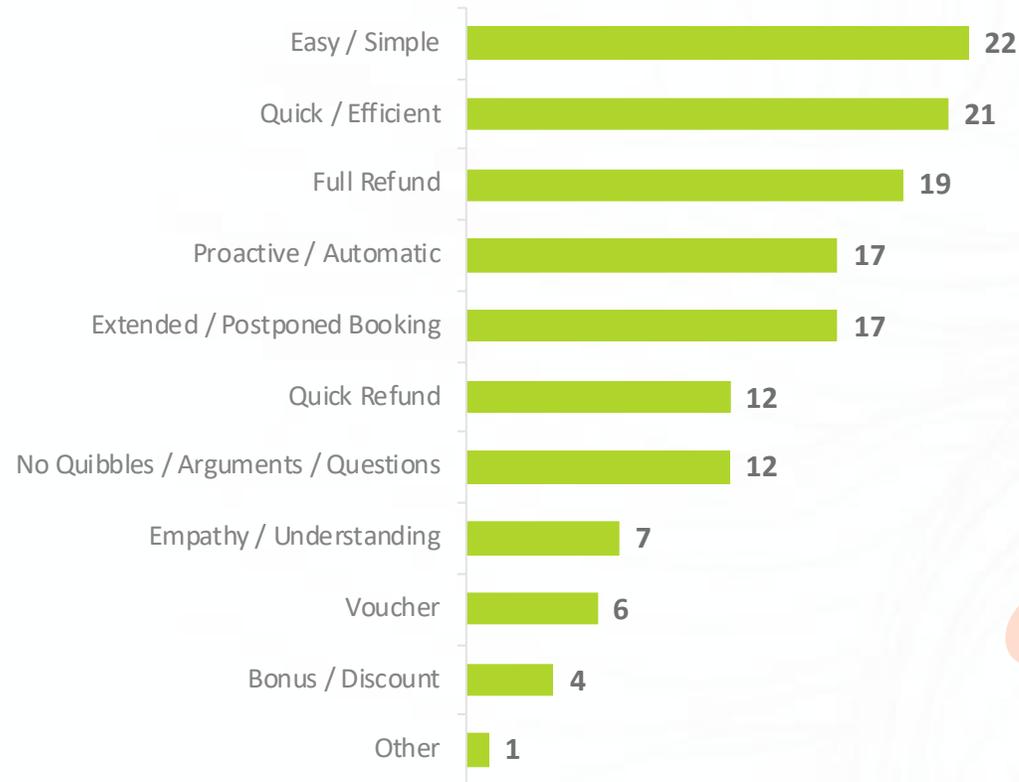
■ Neither/not

■ Satisfied

■ Very satisfied

What makes a good compensation process? Ease, simplicity, speed and efficiency.....and a full refund!

The compensation process was...
(%)



“ Easy. Asked for a refund and received it immediately ”

“ There was no quibble from the company even though under their booking rules I would not have been entitled to a refund ”

“ Trainline refund process was very easy - couple of clicks then I had the money within about 3 weeks ”

“ they proactively contacted me and carried out the refund promptly, I did not need to do anything ”

“ I was pleased to be offered a credit note plus £100 to book a holiday in the future ”

“ I was offered a voucher to use in 2021 so it makes me more likely to rebook with them it's a good gesture and will ensure the business keeps going in the years to come ”

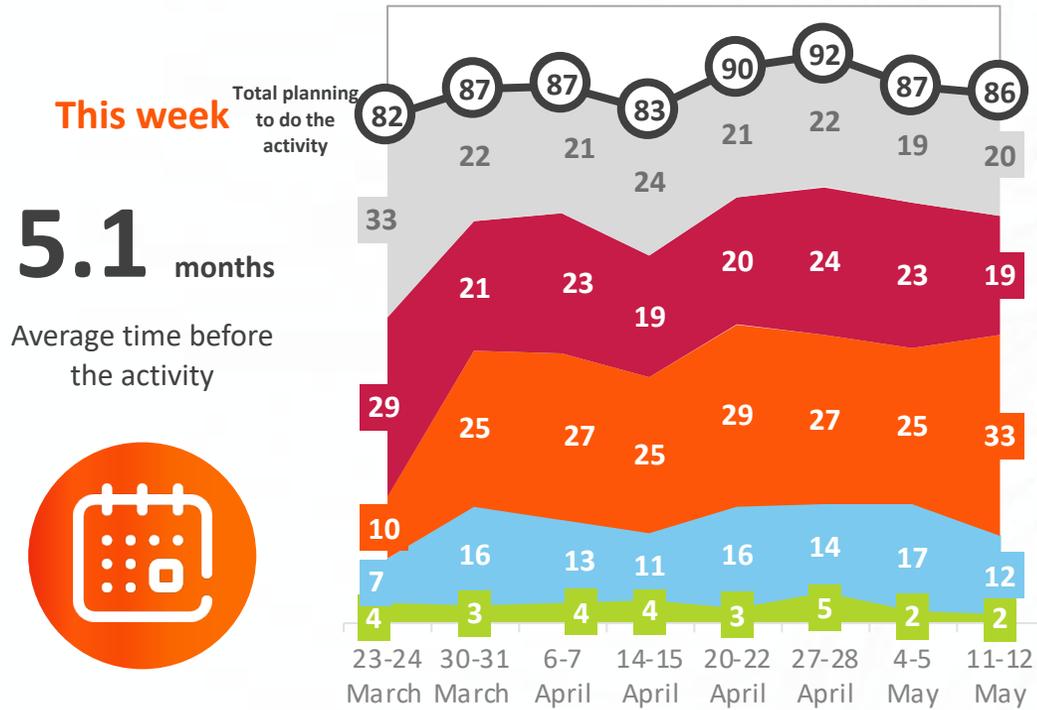
Travel and leisure



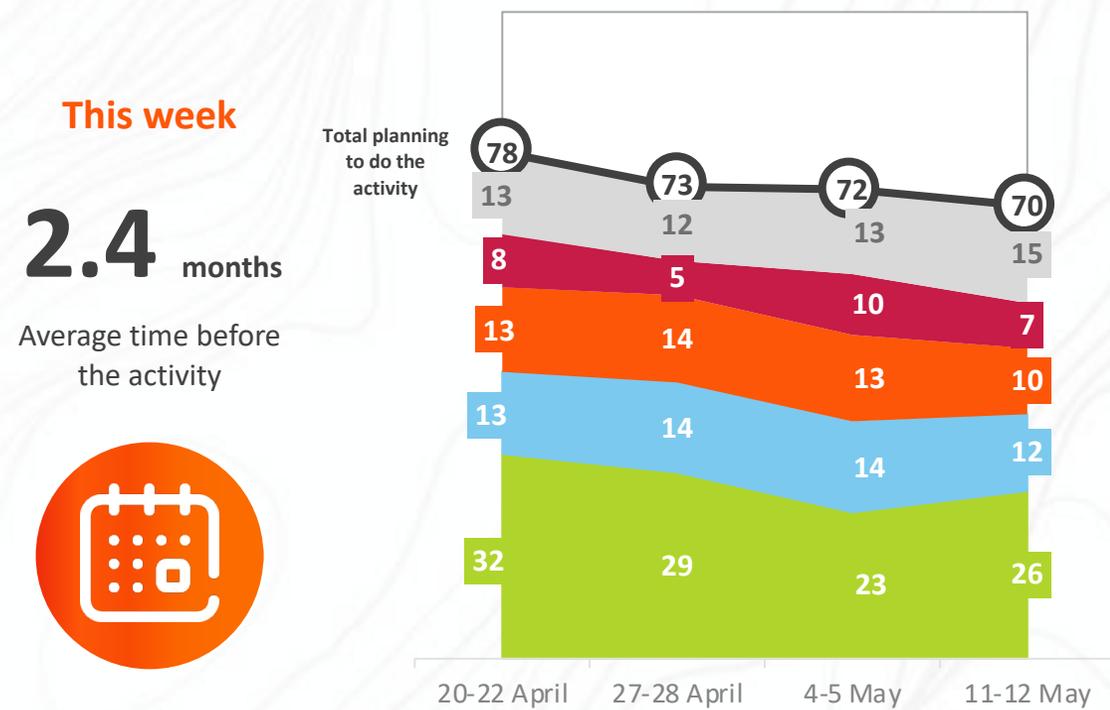
In a week of increased pessimism, a return to visitor attractions seems even further away

After weeks of stagnation, expectations of when Britons will visit an attraction have taken a downward turn this week, 14% anticipating a return in the next 3 months compared to 19% in the previous 3 waves of research. A third now expect to return at some point in the autumn, a number bolstered by both the pessimists writing off summer visits, and a slightly more optimistic cohort who previously didn't expect a return until the very end of the year. There remains a loyal 1 in 4 seeking to engage with digital content in the next month, highlighting that for some, this medium provides an effective alternative to a visit in person.

Go on a day out to a visitor attraction



View online content for a visitor attraction

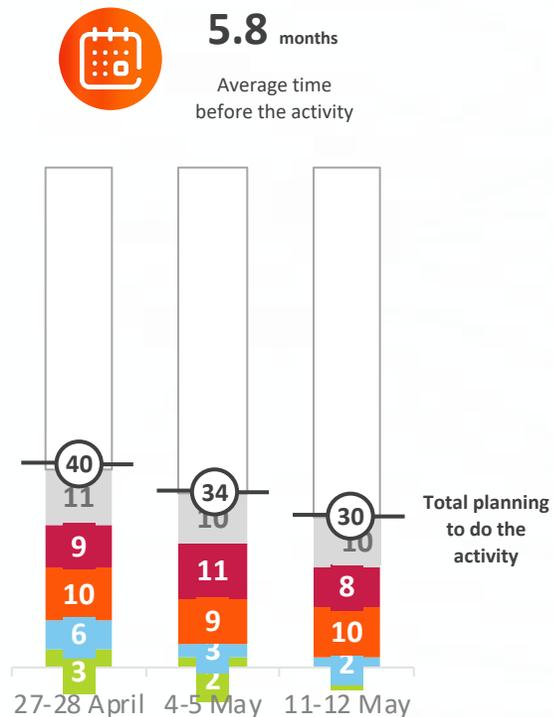


- Planning on doing it but don't know when
- Not planning on doing it
- Within the next 6 to 12 months
- Within the next month to 3 months
- Within the next 3 to 6 months
- Within the next month

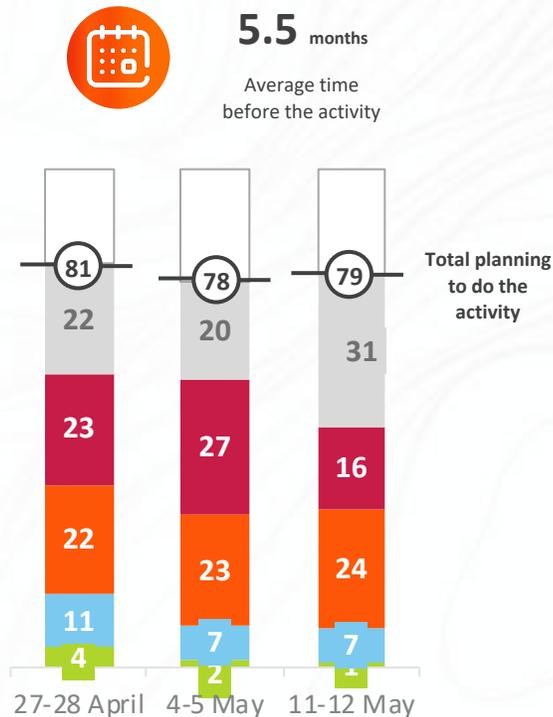
Increased pessimism is predominantly linked to indoor attractions, particularly those with hands-on elements – museums and art galleries are more resilient

Attractions with a higher likelihood of cross-contamination – be they in enclosed spaces or incorporating hands-on elements – have a longer return time than those where social distancing is more achievable (such as museums or art galleries). Although aversion to hands-on indoor venues is intuitive, it's interesting that we have seen *increased* pessimism this week. Positively for museums and galleries, around 1 in 10 anticipate a return by the summer suggesting there is a loyal cohort determined to visit.

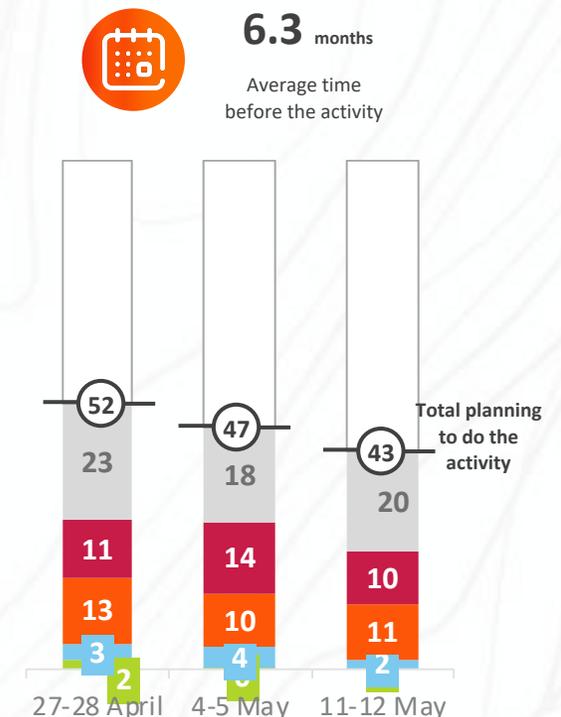
Visit an indoor play centre



Visit a museum/gallery



Visit an aquarium



- Planning on doing it but don't know when
- Not planning on doing it

- 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

New government guidance means that the proportion anticipating a visit to a country park or scenic area in the next month has increased significantly

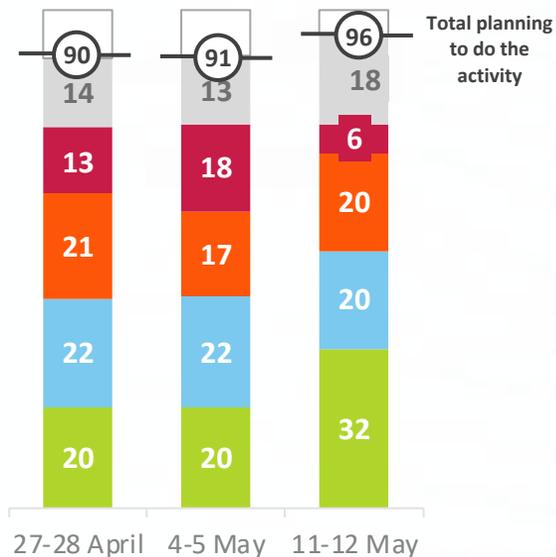
Britons' responsiveness to government guidance is evidenced by a significant jump in plans to visit a country park in the next month. Although not surprising, the big movement in intentions suggests that when government guidance makes an action explicitly possible, intentions and behaviour will follow suit. This implies that when guidance provides a green light for visiting other types of attraction, anticipated lead times will also drop.

Go to a country park or scenic area



2.3 months

Average time before the activity



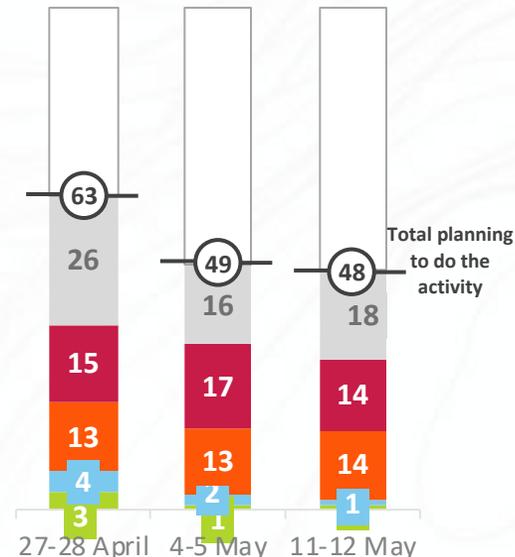
- Planning on doing it but don't know when
- Not planning on doing it

Visit a theme park



6.6 months

Average time before the activity



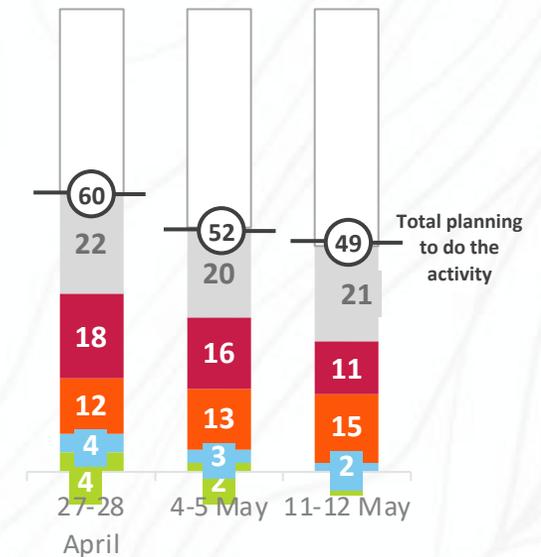
- Within the next 6 to 12 months
- Within the next 3 to 6 months
- Within the next month to 3 months
- Within the next month

Visit a zoo



6.4 months

Average time before the activity



The proportion planning a UK holiday before or during the summer holidays is at its highest point - but these trips are unlikely to happen soon

Britons are thinking about planning and booking a UK holiday more than at any point in the last two months, and their anticipating next trip is edging increasingly closer. But for most, these trips are a distant dream. On average Britons aren't anticipating planning or booking a UK holiday for over 5 months, and don't expect to go on a UK holiday for over 6 months. The example of visits to country parks demonstrates that behaviour is heavily influenced by government guidance, so UK holiday intentions may increase as restrictions continue to be lifted. However, taking a holiday is more complex than visiting a country park – holiday-makers will need to feel confident about all of the touch points, including accommodation, transport, things to do, places to eat and the response from locals. To save the summer holiday, Britons will need confidence in these touch points sooner rather than later.

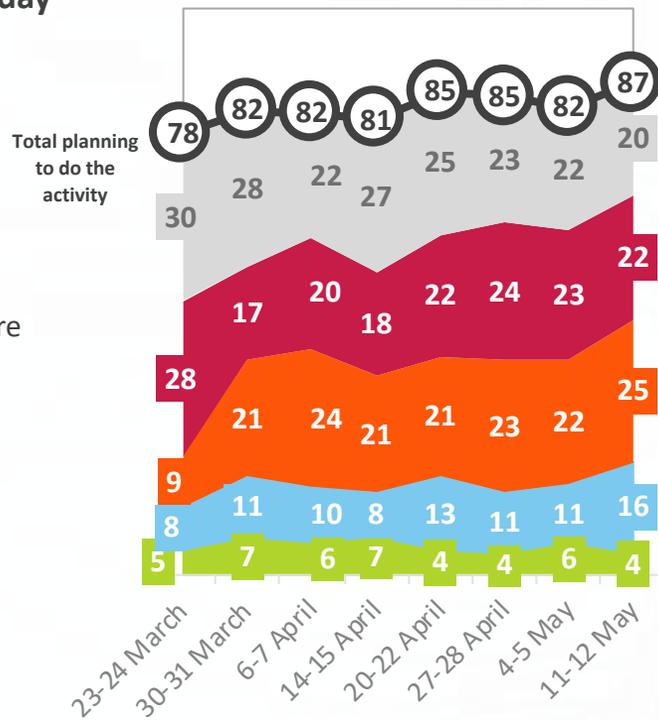
Plan a UK holiday

This week

5.1

months

Average time before the activity



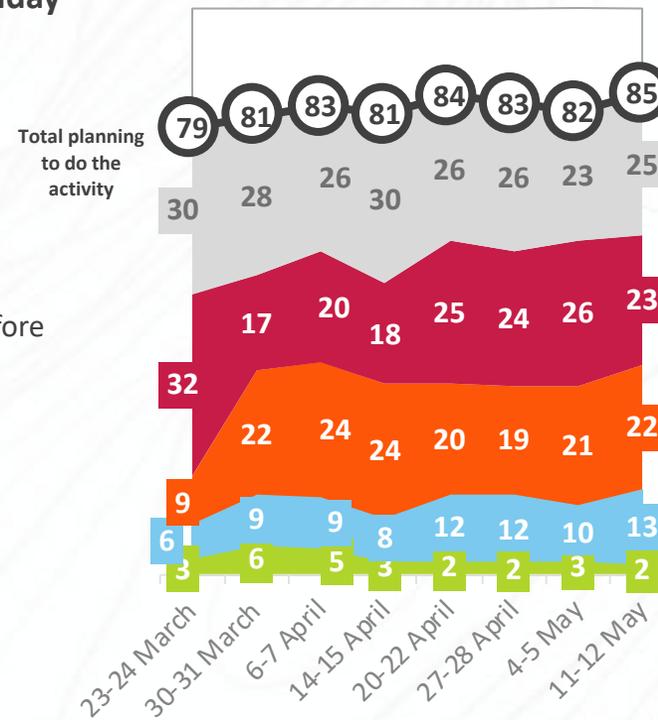
Book a UK holiday

This week

5.4

months

Average time before the activity



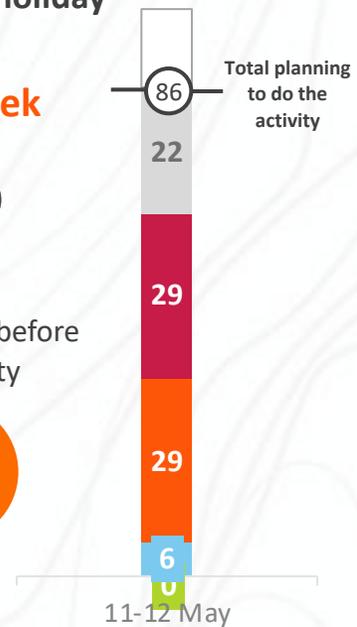
Go on a UK holiday

This week

6.6

months

Average time before the activity



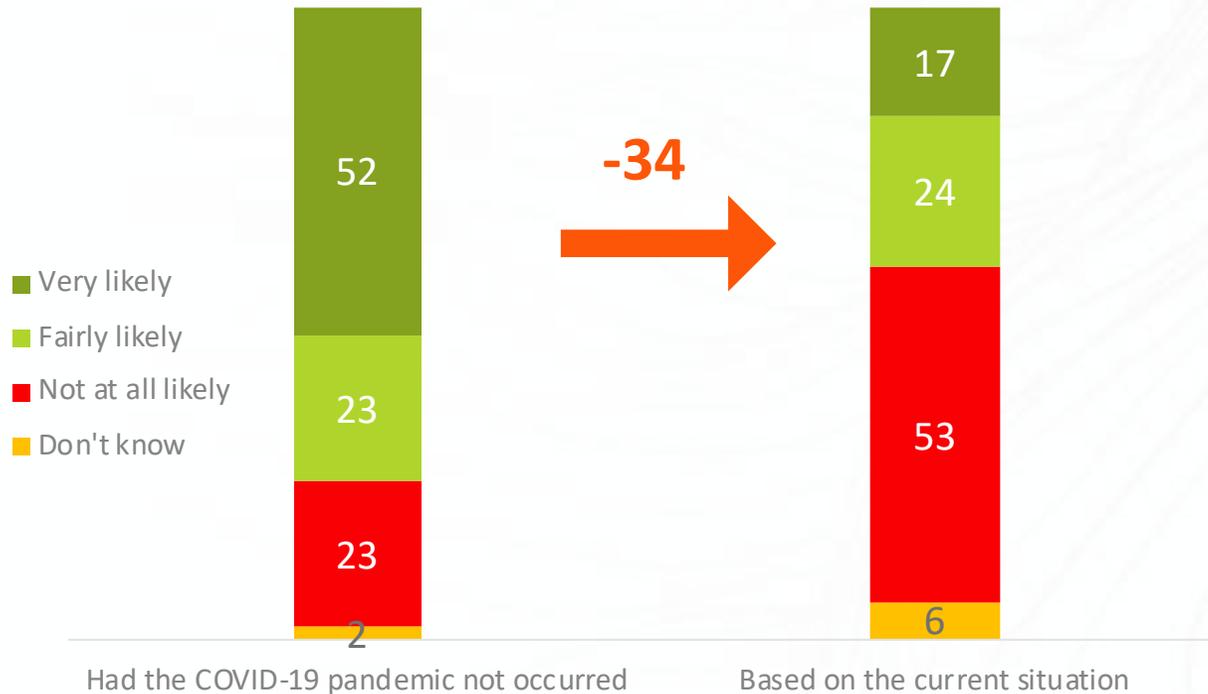
- Planning on doing it but don't know when
- Not planning on doing it

- Within the next 6 to 12 months
- Within the next 3 to 6 months
- Within the next month to 3 months
- Within the next month

41% of the population are still entertaining the idea of a UK summer holiday, but this is significantly lower than if the pandemic had not occurred. Empty Nesters are the most cautious

Despite media talk of a summer staycation boom, stated intentions currently indicate a *downturn* on normal behaviour. The downturn is most apparent amongst empty nesters, the life stage paradoxically least impacted financially. Londoners and younger audiences are the least likely to drop off suggesting it may make sense for destinations to pivot towards these in their marketing. That said, given their free time and high disposable income, efforts should be made to reassure empty nesters that visits will overcome their concerns.

Likelihood of taking a UK summer break (%)



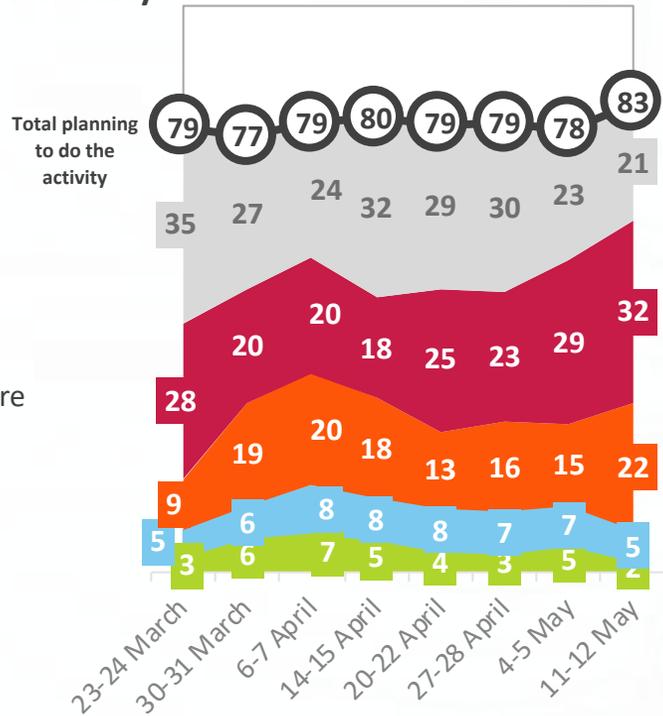
| % likely | Likely had pandemic not occurred | Currently likely | COVID-19 net impact |
|------------------------------------|----------------------------------|------------------|---------------------|
| Pre-nesters (16-35 no kids) | 78% | 51% | -27 |
| Families (16-64 kids in household) | 72% | 46% | -26 |
| Older independent (36-65 no kids) | 70% | 35% | -35 |
| Empty Nesters (65+ no kids) | 83% | 36% | -47 |
| Social grades ABC1 | 73% | 41% | -32 |
| Social grades C2DE | 76% | 40% | -36 |

Although Britons are increasingly *thinking* about overseas holidays, on average they don't anticipate *taking one* until early 2021

This wave's research highlights Britons' pessimism in taking holidays overseas, the average next trip nearly 9 months away (February 2021). A stoic 4% intend to go on an overseas trip in the next three months, but following the announcement of a 14 day post-trip quarantine, short term demand is on the decline. The increase in overall planning and booking intentions provides some consolation for tour operators, but our research suggests these intentions are all focussed on the medium and long term.

Plan an overseas holiday

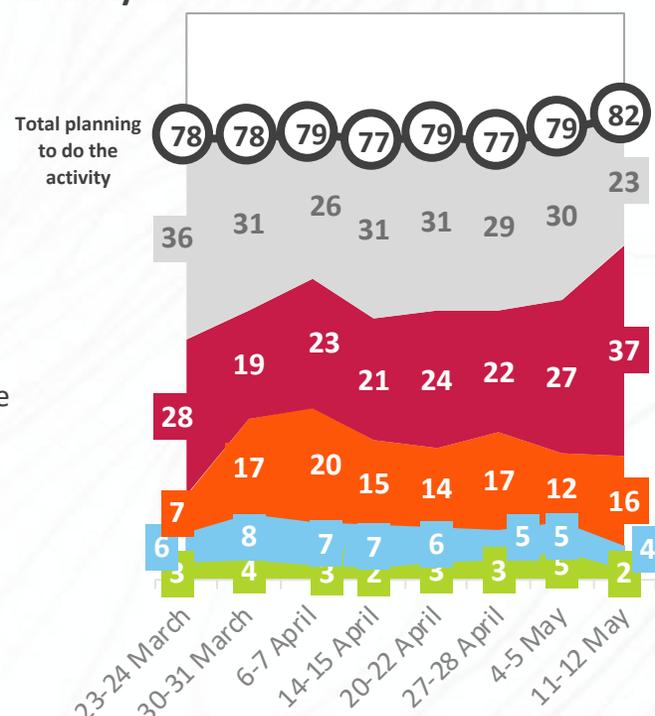
This week
6.8
months
Average time before the activity



- Planning on doing it but don't know when
- Not planning on doing it

Book an overseas holiday

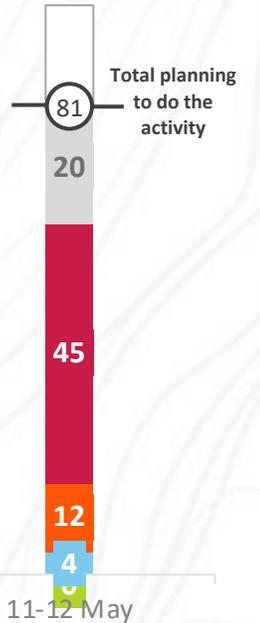
This week
7.2
months
Average time before the activity



- 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

Go on an overseas holiday

This week
8.7
months
Average time before the activity



The UK government's proposed 2 week quarantine period for people arriving in the UK has been met with a mixture of consternation and confusion.



“That’s ok. But WHERE can we go ??? I am not going to travel somewhere where I shall be tagged and put into quarantine- even if it’s my holiday home!!”

“Travel firms will need to give people options if they tell me i have to go on holiday but I have to quarantine in both Spain and England for 14 days when my holiday is 10 days thats insanity and makes no sense. Hope they give options for refunds or vouchers like BA did”

“It can’t go up because keyworkers won’t be able to afford it. The 14 day quarantine rule has killed off virtually all tourism and business travel anyway so most air companies will go bust. Think a mandatory test pre-boarding a uk bound flight would have been the better option.”

“Seriously imposing a 14 day quarantine to people arriving into another country is ridiculous, nobody is ever going to travel.”

“There is a list of things they have done which was incorrect & a failure. Airports passengers not checked through out pandemic & quarantine Which basically means the whole 2 months lockdown was pointless as it was brought over by air travel from the start & was never contained”

“@BorisJohnson plan to quarantine air arrivals is impractical and a danger to the travel industry. It’s also too little too late.”

“@SimonCalder @thismorning what does this mean for British public who have holidays booked ? Enough issues getting refunds when it was a clear cut travel ban. Potentially this will open up a loophole for future trips to be impossible to take but can’t/won’t be refunded”

Short-term plans on visiting both the gym and the cinema have dropped this week, continuing the trend seen with other indoor entertainment

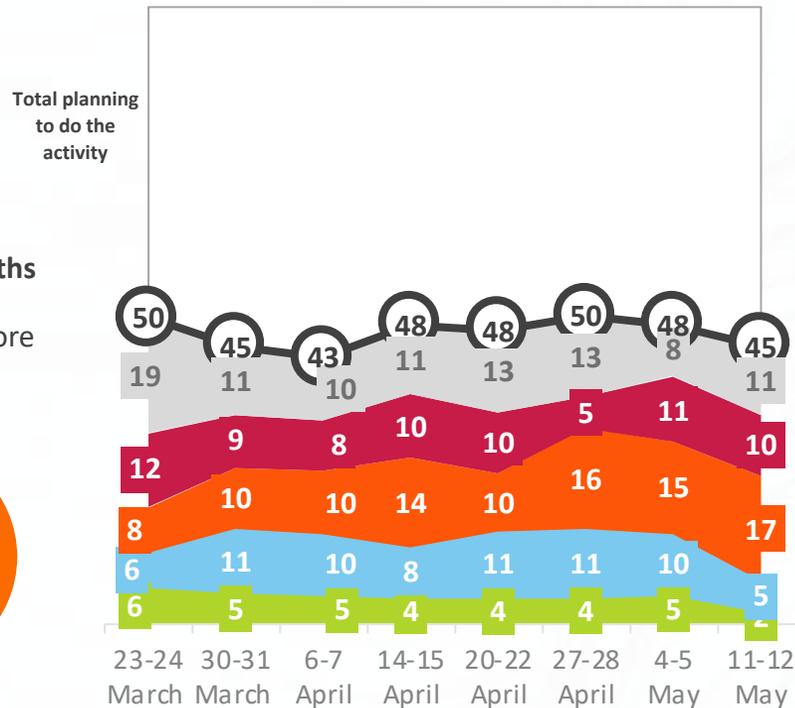
This week, gyms and cinemas take a 'triple hit' in consumer pessimism. The overall proportion planning on visiting either have both dropped, and amongst those that *are* planning on visiting, the proportion stating they 'don't know when' has increased. Finally, with evident concerns about the health implications surrounding the lifting of lockdown, short-term demand has nearly halved, only a small minority thinking they will visit in the next 3 months.

Go to the gym

This week

5.0 months

Average time before the activity

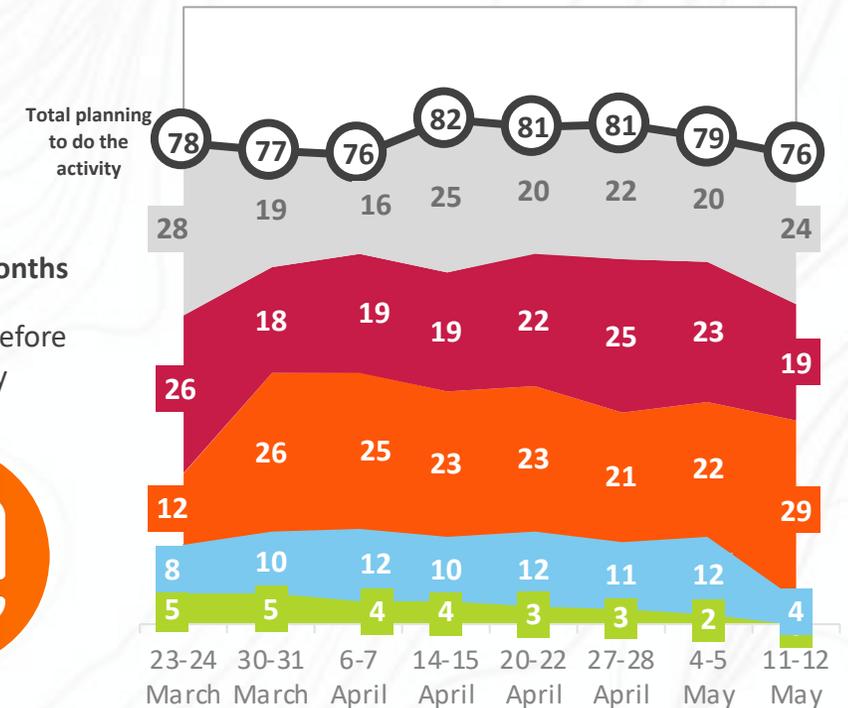


Go to the cinema

This week

5.6 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

For many, plans on visiting restaurants and shopping malls have also been put on hold

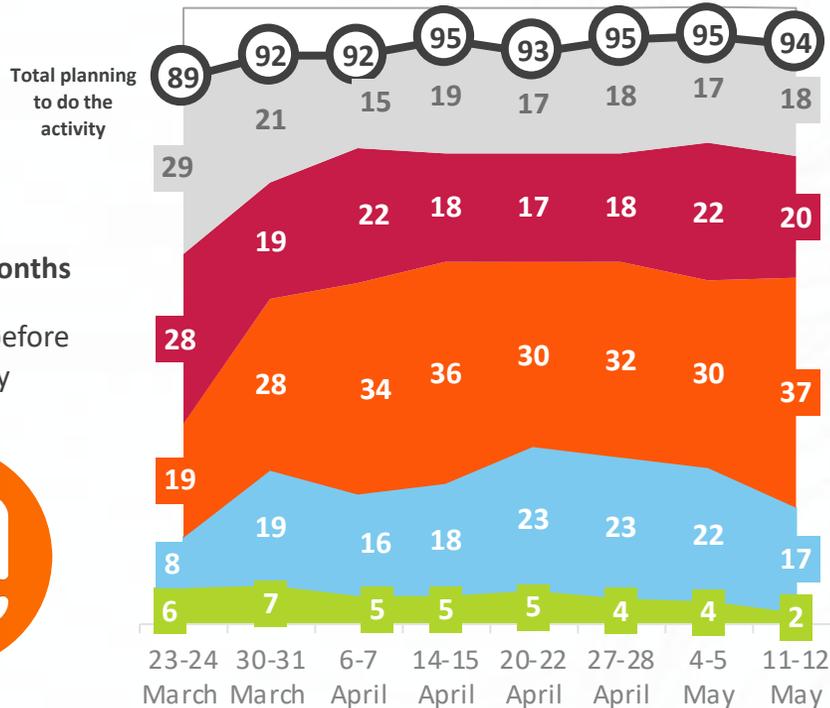
Despite this week marking a slight lifting of restrictions and a suggestion that restaurants could re-open on the 4th July (if the government's 'five tests' are met), Britons continue to be increasingly pessimistic about when they will visit in person. Indeed, plans to return to restaurants and shops by July have plummeted this week, suggesting the public have limited faith in these provisional time scales.

Go to a restaurant

This week

4.7 months

Average time before the activity

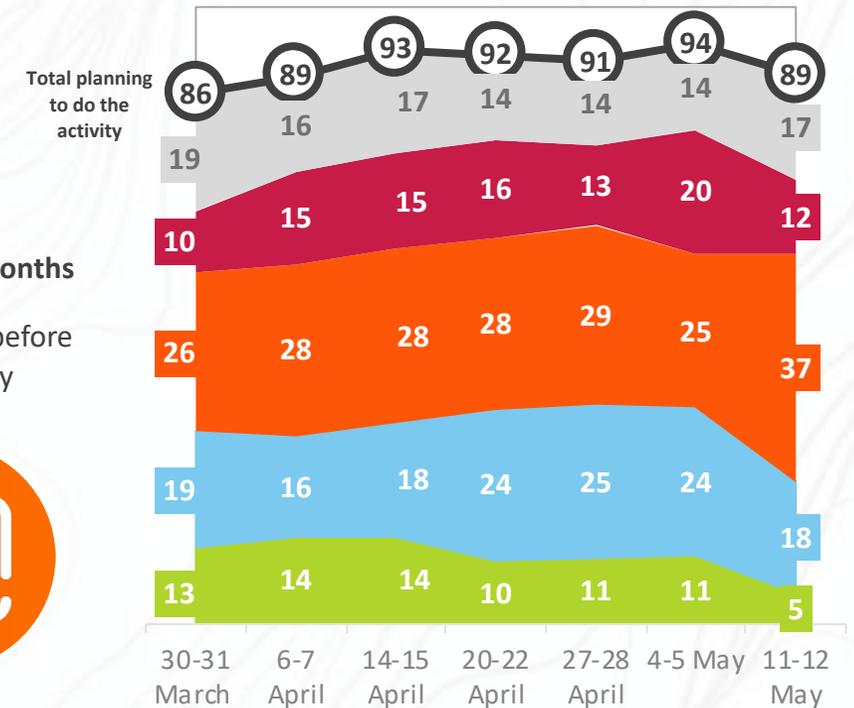


Go shopping or to a shopping mall*

This week

3.8 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

The public responded to Dominic Raab's statement with suggestions and examples of how restaurants and pubs can re-open safely and responsibly, highlighting an underlying frustration with the rigidity of the rules

sky news

Coronavirus: No haircuts, pubs or restaurants until July at the earliest, says Dominic Raab

“ People seriously?? All restaurants and coffee shops should be open soon. Lots of people can lose their jobs. Plenty of companies will close permanently. That's what we want? I don't think so.... just keep distance... restaurant and pubs are same places as grocery stores... ”

“ I doubt there will be many pubs, hairdressers or restaurants left to open by that point. The government is so desperate to cut off any financial help and job retention, that business owners are going to have to close their businesses ”

“ Watching all our local bars, restaurants and café's open in Murcia, Spain, with such simple, yet ingenious, social-distancing measures, is such a delight to see over on Facebook ”

“ After this is over people will be worried, be used to being at home, eating at home & socialising over the internet - I do not believe we will suddenly morph back into pre lockdown trading so we have to find ways to get customers back making them feel safe is the first step ”

“ Possible dining normality once restaurants reopen: Food to be covered when served, Waiters with masks, 1.5m between tables, Diners can't stay over 2 hrs, No groups, Digital payment only, No buffets, Air-conditioning to be turned off ”

“ If @SadiqKhan and @CityWestminster are serious about saving hospitality economy, social distancing and climate change they should make most streets in Soho and Covent Garden pedestrians only allowing restaurants to expand outdoor. ”

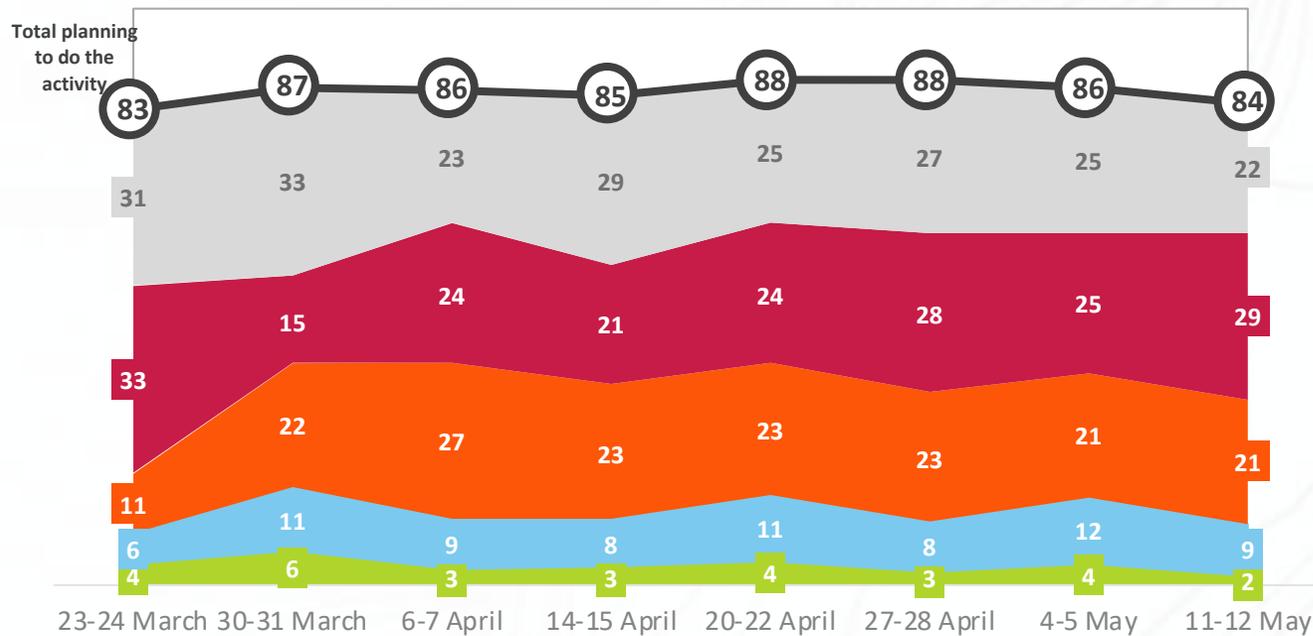
“ You can easily social distance at a restaurant. More spread out tables, limited number of booking takings, staff wear PPE. It's much easier in a restaurant than a bars/pubs ”

When do respondents expect to book hotel accommodation again?

- One step forward, one step back... that seems to be the recurring fortnightly pattern at the moment, although the overall total planning to book hotel accommodation drop for the second week and returns to where it started.
- It's probably no surprise there was an expansion in the "next six to twelve months" category in the wake of the Government saying that July would be the earliest the hospitality sector could start to re-open.
- The lack of significant movements across the categories, though, suggests we're still very much on hold for this activity. When the most immediate two categories start to show movements, we'll be able to start looking ahead to recovery.

Book hotel accommodation

This week
6.1 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

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 – Hotel changes that customers seek

Amending booking policies

Thank you @premierinn for the great customer service. I had a hotel room booked on non-flex for August for a trip to London to see Sister Act which has now been rescheduled. They changed my booking to an Advance booking so that we can cancel and received a full refund.

Free, efficient refunds

Thanks to @premierinn for your refunds policy regarding #COVID19 and my London stay later in May Received (sic) my refund and will defo book to stay with you again. 👍😊

Efficient refunds

During these difficult times, their response has been magnificent. We had two non-flexible bookings - one in May and one in June. For both, they have contacted us and told us we can cancel with a full refund

Safety measures

For the foreseeable future, guests will see more hand sanitizers, more signs about social distancing, less furniture (to make room) and all staff in face coverings

Less communal areas

The "riskiest" travel will be a dense, tall hotel that requires long elevator rides, has an intimidating HVAC system, and shared eating facility. An Airbnb makes those problems go away

New cleaning protocols

@HiltonHotels clean stay program awesome. CEO Nasserta (sic) leads the way #success

Trust in cleaning standards

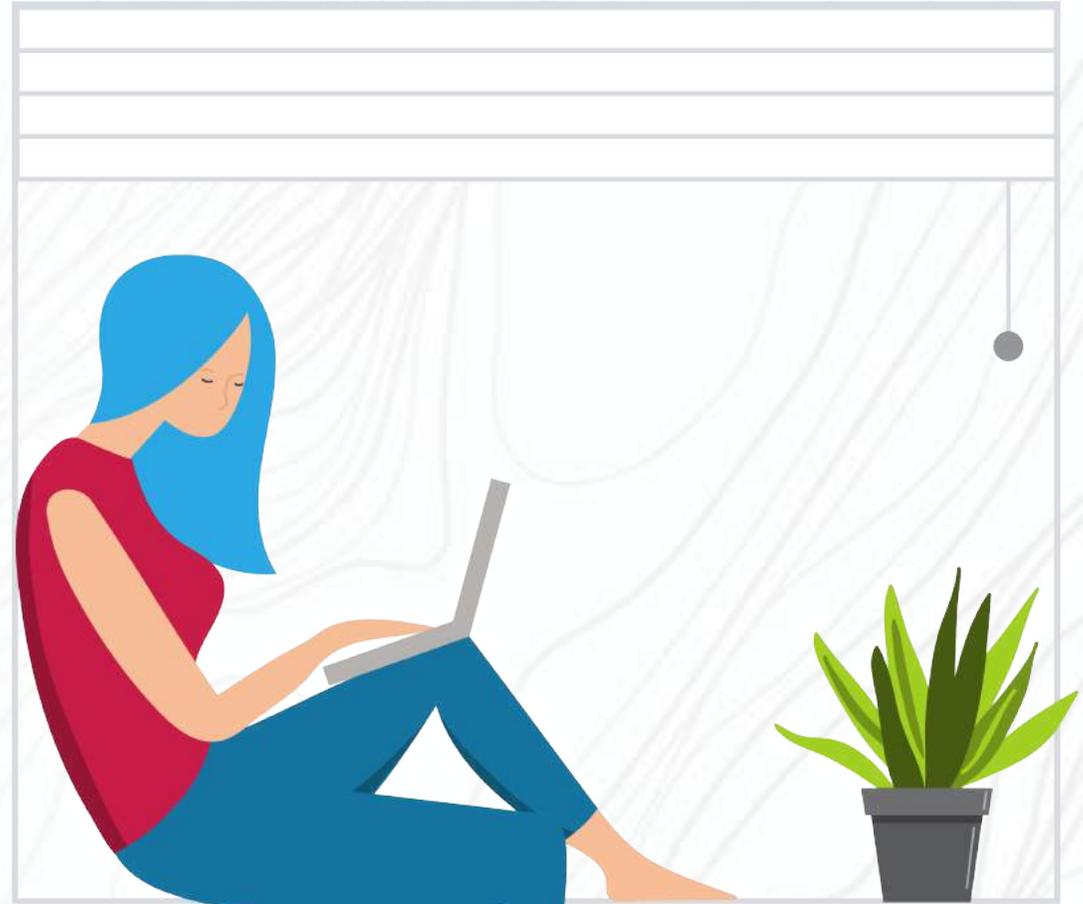
People trust large brands to clean more than ad hoc Airbnb. If we learn virus can't survive anywhere for more than 24 hours, then an Airbnb "every other night" could be powerful promise

I trust a chain more

Much harder to review whether a place has been disinfected vs whether it is tidy. Unless you see the process, how do you know a counter is disinfected vs just wiped off. It's a risk in hotels too, but I trust a chain to follow procedures more than I trust an Airbnb host"

- Conversations are still happening around refunds and re-arrangements. A little flexibility seems to go a long way
- Travellers are beginning to imagine what travel will look like in future and are reacting to the brands' various cleanliness initiatives
- Consumer opinion on the attractiveness of Airbnb is divided. Those engaged with the concept find ways to justify it, while those opposed find ways to criticise. (It's actually quite nice to find something that hasn't changed as a result of this crisis!)

Transport



ALLIGATOR



Intention to use bus services falls to its lowest level since start of tracking, while intended use of rail services also declines.

The anticipated shortening of lead-times for public transport services following the PM's announcement that 'those who can return to work, but cannot work at home, should go to work', has not happened so far – indeed more people are indicating that they will not use bus and train services, perhaps indicating confusion as to how social distancing measures will work in practice.

Take the bus

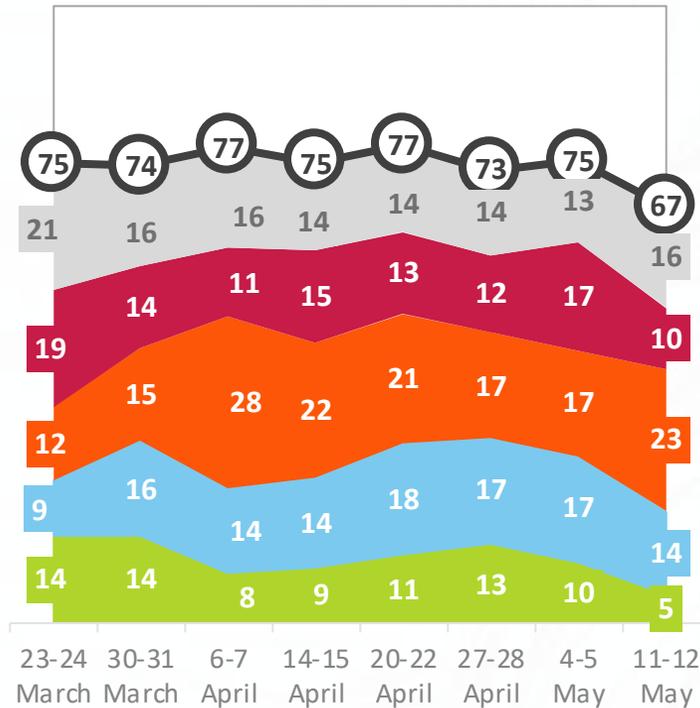
This week

4.0 months

Average time before the activity



Total planning to do the activity



Take the train

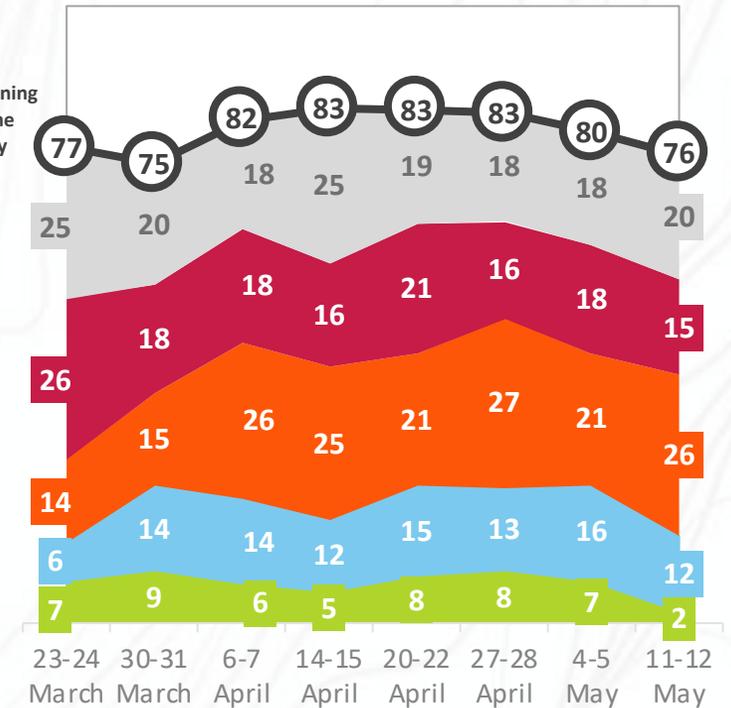
This week

4.7 months

Average time before the activity



Total planning to do 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

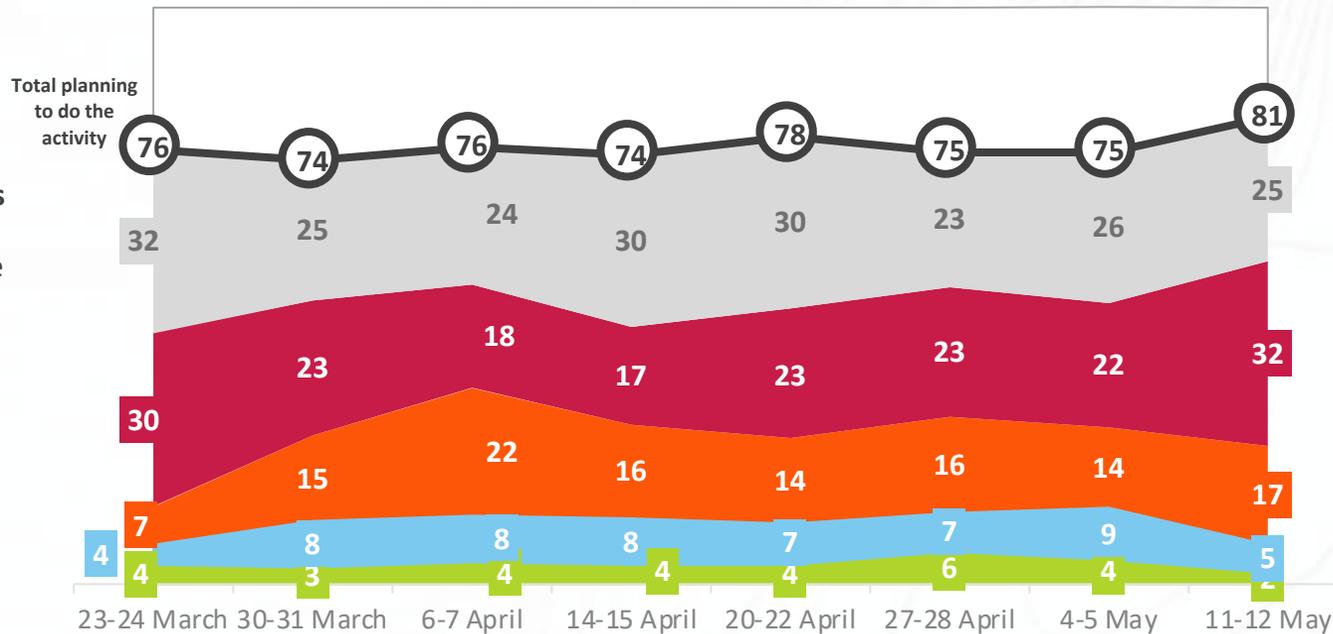
It's mixed news for aviation, with higher reported intention to fly – but anticipated lead times to next booking lengthen further, not helped, no doubt, by the proposed quarantine period.

Book a flight

This week

6.8 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

On social media – Response to Unite’s “We love you, BA” video

BRITISH AIRWAYS



“ To all employees at British Airways I truly believe we are the heart of this organisation. We are all proud to wear the uniform & represent our airline. 32 years of experience and more to give! 🙏 Bless you all
#BAStopThinkAgain ”

“ Someone PLEASE challenge this! If @British_Airways can get away with this, then the jobs of all workers (not just BA) will be at risk. Don't lose this story to C19... ”

“ #BAStopThinkAgain how do you sleep at night @British_Airways .well I can tell you I have hardly slept since Alex Cruz announced potential redundancies. Then came the real news of a possible 50-60% pay cut. 24 loyal years for what . Your actions are immoral and cruel ”

“ @British_Airways it's not the product your customers keep going back, it's your crew!
#BAStopThinkAgain ”

“ Ever flown BA? You can't say that not 1 person looked after you at some point of your journey. Think about them. Please share.
#BAStopThinkAgain #ShameonBA
#BritishAirways #Redundancies
#UniteTheUnion #BASSA youtu.be/kLloF1IYmss ”

“ This sums up the sheer disgrace of what @British_Airways is doing. WATCH THIS VIDEO
youtu.be/5Kf2XeUPO2A #BAStopThinkAgain ”

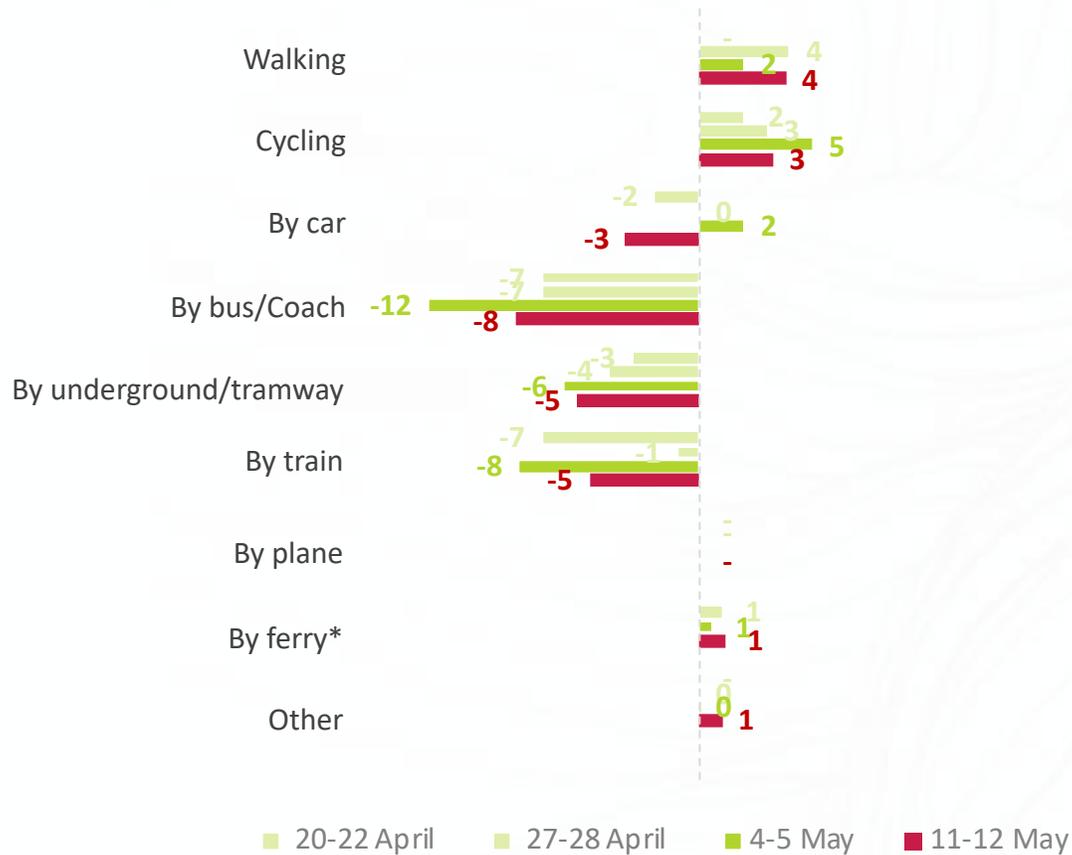
“ #BAStopThinkAgain #crewjobs #cabincrew #mentalhealth . Times are testing as it is without the further worry of being made redundant or having your terms and conditions torn up for a minimal contract . 24 years loyal service and thrown on the scrap heap 🤔💔 @British_Airways 💔🤔 ”

“ Hey @British_Airways You are my preferred airline... or have been this far. Do the right thing. You've made massive profits lately as has IAG. Support your workforce now! ”

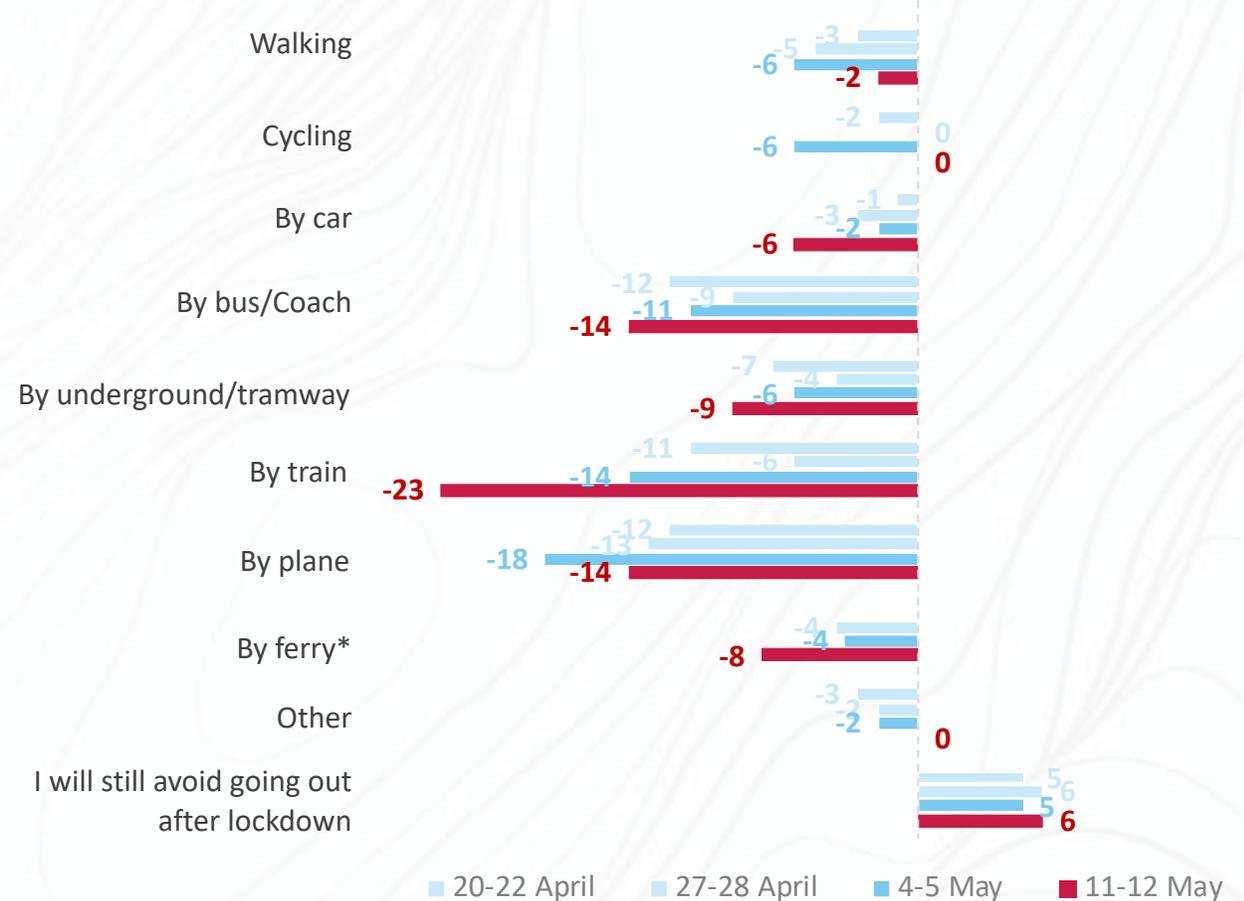
“ A very effective message from BA staff💔 Others criticise @richardbranson, yet BA, with billions in bank, is publicly crucifying its employees. Contemptible, abhorrent behaviour
@British_Airways! ”

Anticipated commuting behaviour post lockdown continues to point to higher levels of walking and cycling. For business and day-to-day leisure, all forms of transport, except cycling, record anticipated declines in usage.

Commuters - Post lockdown change in usage (%)



Leisure/business - Post lockdown change in usage (%)



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

On social media – What do people seek from the transport sector?

“ # Safety measures on the tube ”

Tube packed after Boris told people to go back to work. Most with no masks. London Underground performing no social distancing. – people want measures in place ”

“ # Needs a clear safety plan ”

The key concern (from my personal point of view), is suddenly piling back onto a packed train in the morning commute, where masks are *not* mandatory and the 2m rule cannot be exercised, is surely a recipe for disaster before I've even got to my destination?! ”

“ # No return to 'old' normal ”

I am not sure how public transport will be able to return to pre-pandemic levels for some time as shielding/self-isolation are still causing high levels of staff unavailability. You can't train people to drive buses and trains overnight. #PublicTransport #Covid19UK ”

“ # Testing before travel ”

Instant breath tests could be given before passengers alight planes or trains or for restaurants. If you know you are entering an environment which is Covid free, you can get on with things a lot easier ”

“ # Changes to planes wanted ”

@aa @Delta @JetBlue @British_Airways etc. to entice us to fly you must show us how clean your planes are, how spotless the sinks are for real handwashing, how you've widened aisles and blocked middle seats ”

“ # Testing before travel ”

The high number of deaths of London bus drivers is of a piece with other evidence that prolonged exposure in enclosed spaces to someone infected w/ coronavirus is unsafe. 2 metre social distancing won't make buses and the tube safe ”

“ # Social distancing on the tube ”

Social distancing is impossible on the tubes which were busy today. What were they thinking? #BorisHasFailed #COVID19 ”

“ # Make masks compulsory ”

So only two people on my carriage have masks (two ladies). I'm the only guy with a mask ! Think it's time to make them compulsory on public transport... ”

“ # Intense cleaning regimes on the tube ”

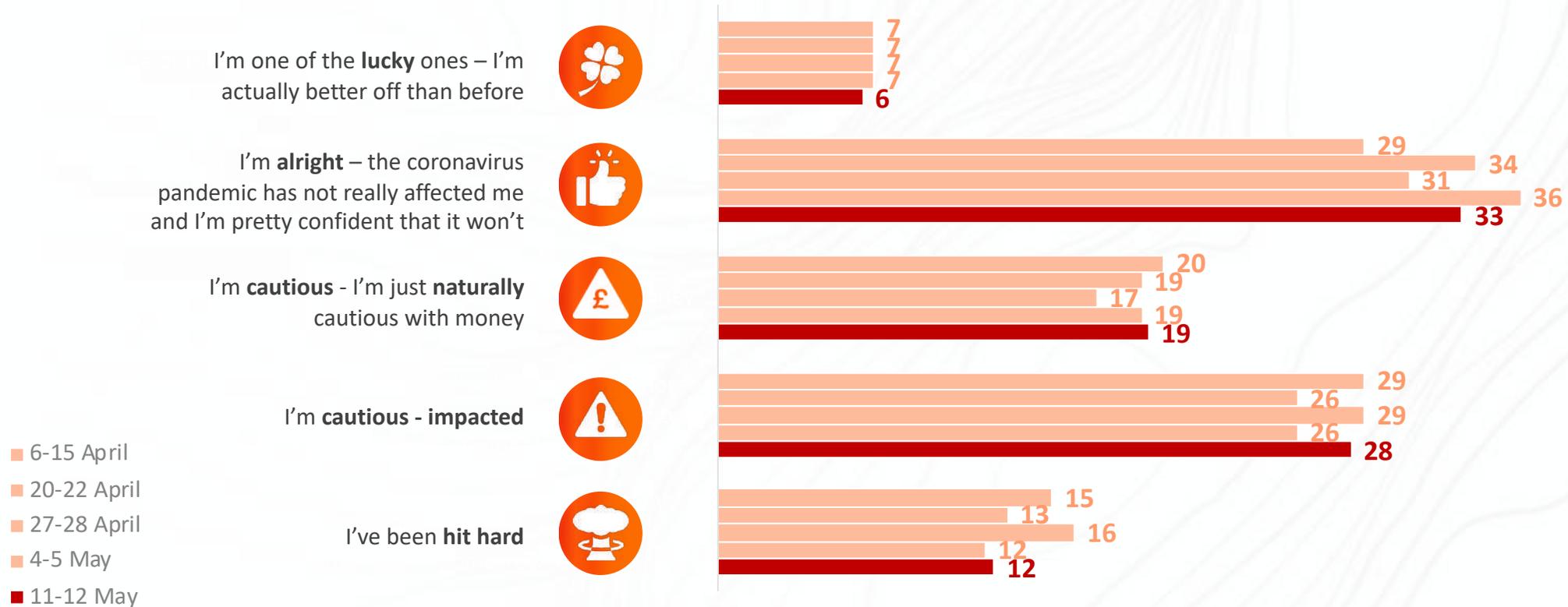
I'm hoping the tubes will be intensely cleaned before we need to go back out there @TfLRail ”

Personal finances



Financial mindsets in the 'here and now' have remained relatively stable since the early days of lockdown

Personal feeling about own current situation – segments



Q17: If you had to choose, which ONE of the following statements would best describe your feelings about your own situation, right now?

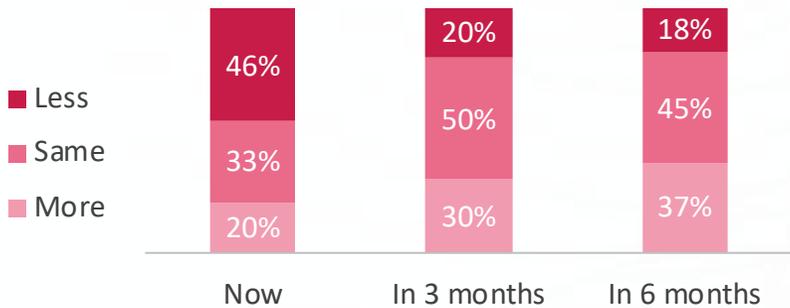
Q18: Some people are just naturally cautious with money. Others have become cautious, because of their financial situation during the coronavirus pandemic. Which one of the following best describes you? N=502

Income and outgoings are both down in comparison to life before lockdown, but outgoings are expected to return and then escalate more quickly

Income in comparison to life pre-lockdown

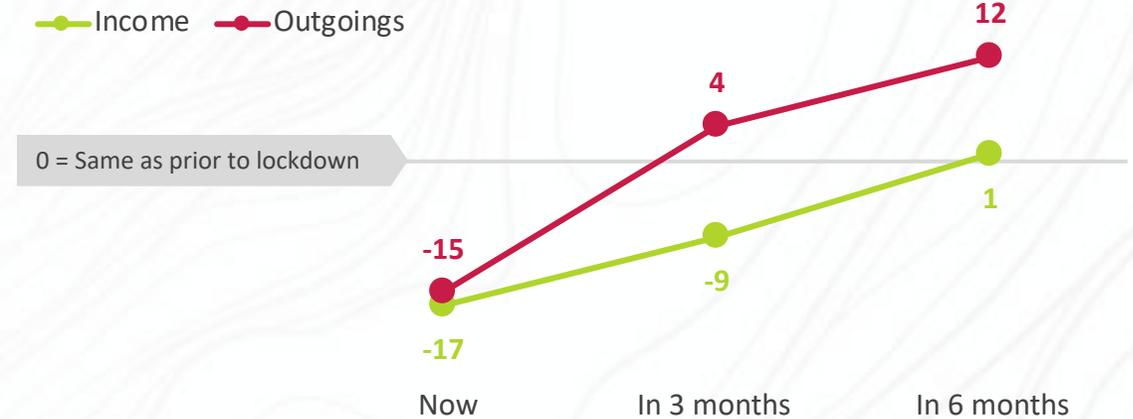


Outgoings in comparison to life pre-lockdown



INDEX: Income vs. outgoings in comparison to life pre-lockdown

Scores on a scale of -100 (a lot less) to +100 (a lot more)
0 = the same as before lockdown

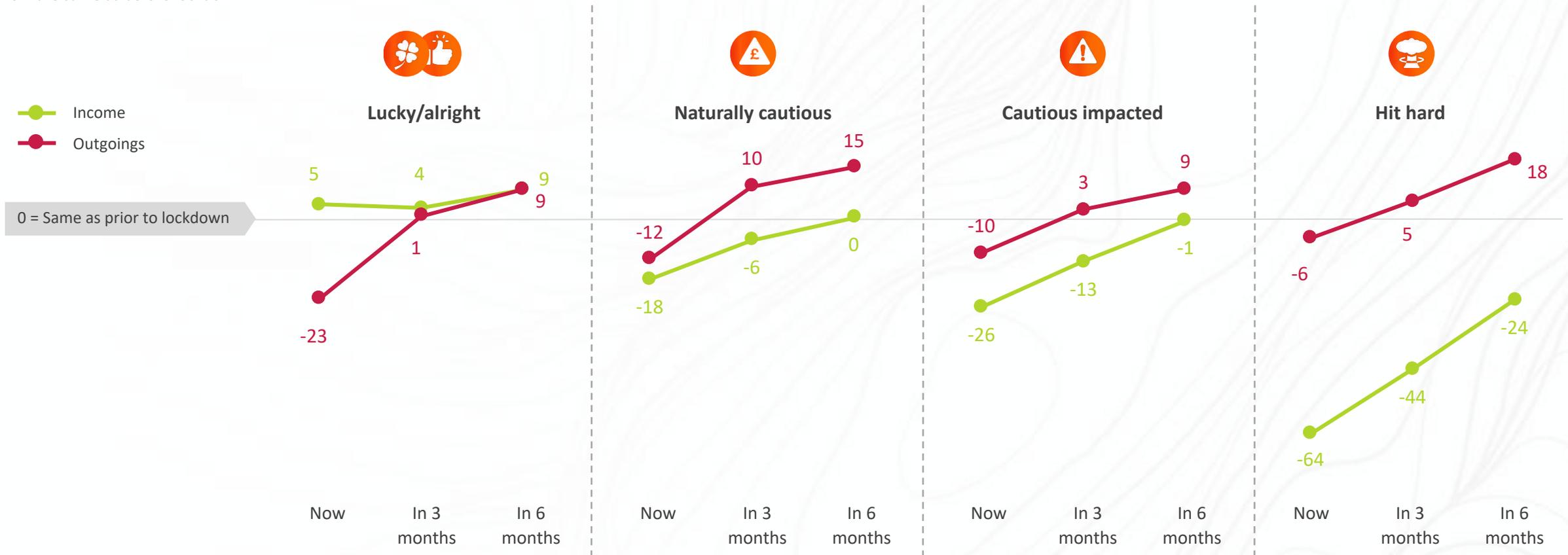


On average, income is expected to have returned to 'normal' in 6 months' time, but outgoings are expected to be higher at this point. This will potentially cannibalise funds for the discretionary spending that a number of sectors may be counting upon for recovery. In more severe cases, the financial well-being of certain consumer segments may be at risk.

'Lucky/alright' are the only segment who expect to return to a net neutral position. 'Hit hard' foresee a marked gap, with income well below 'normal' for some time.

INDEX: Income vs. outgoings in comparison to life pre-lockdown according to financial mindset

Scores on a scale of -100 (a lot less) to +100 (a lot more)
0 = the same as before lockdown



Thinking about your situation now / in 3 months / in 6 months how (do/will) the following aspects of your finances compare to earlier this year, prior to lockdown?
All n: 250

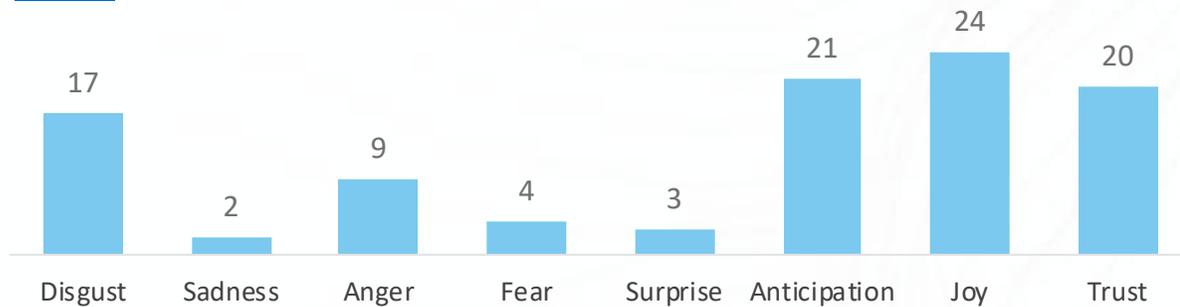
On social media - Spotlight on Monzo and AMEX



monzo Emotions in social media posts (% posts in the last month)



AMERICAN EXPRESS Emotions in social media posts (% posts in the last month)



An assessment of the emotions within social media posts emphasises the positive impact of assistance with day-to-day expenses, beyond more significant initiatives such as payment holidays.

A certain amount of negativity is commonplace on social media, particularly for finance, but Monzo and Amex stand out as brands attracting a higher degree of positive emotions. Both receive praise for assisting customers with money management or for support securing much needed refunds.

Support of this nature, and financial well-being strategies, are likely to assume even greater significance for brands and consumers as we emerge from the pandemic and face longer-term economic consequences.

*It's obviously more of an effort with extra shopping for groceries and cooking - but it is worth it...
Monzo has helped me see this huge hole in the budget...so glad I got on it lol*

@AmexUK Excellent service from AMEX to help get my deposit back from Kuoni who were helpful to a point however Amex support was excellent to resolve the situation finally.

Appendix



Methodology

Quantitative survey

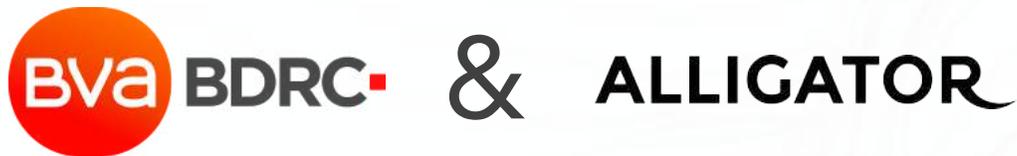
Online survey amongst people who have done two of the following since the beginning of the year (01 Jan 2020):

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 about 500 respondents per wave.
This week we surveyed exactly 500 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:

- 64,059 posts for the transport sector
- 44,570 posts from the leisure sector
- 16,277 posts from the hospitality sector
- 6,570 posts from financial sector

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