

Tracking Consumer Sentiment on the Impact of COVID-19

Travel & Mobility, Leisure & Hospitality,
Personal finance

Weekly Update – 1st July 2020



ALLIGATOR



Introduction

Exactly as we anticipated last week, confirmation of the re-opening of much of our leisure and hospitality industry has been followed by a pronounced uptick in short term booking intentions for July and August – be it hotels, staycations or restaurants. For these cash-starved sectors, the coming to fruition of a much-anticipated post-lockdown spike in demand will be very welcome news. Once this pent up demand is spent, however, we are left with a twin threat to the recovery phase: recessionary headwinds impacting discretionary spending power, and residual fears among many consumers about the threat posed by COVID-19.

Attitude towards risk is a significant fault line in our national discourse right now. You only need to glance at the social analytics coverage in our weekly reports to get a feel for the division of opinion around the re-opening of the travel and hospitality market. Many of us are desperate to get on with our lives, to book that holiday, go out for a meal....and, yes, get that haircut! Others, however, point to the mass outbreak and renewed enforcement of restrictions in Leicester to evidence the fact that the threat has not gone away – in some cases expressing their fears that the government is prioritizing a need to re-start the economy over public health.

While quality assurance schemes are a useful and necessary starting point in helping to reassure customers, for marketers, it is increasingly important to understand the profile of the key attitudinal segments, the range of psychological barriers to purchase and how these may best be overcome. We should not fall into the trap of focussing on health and hygiene to the exclusion of everything else – as our BVA BDRC colleague James Bland puts it, ‘who wants to holiday in a hospital’!

In our fieldwork for the current week we have made a start on this kind of attitudinal segmentation – and we look forward to sharing the results with our readers.

Stay tuned and stay safe!



Matt Costin
Managing Director, BVA BDRC



Suzy Hassan
Managing Director, Alligator Digital

Executive Summary

National mood improves....but many still concerned that the worst remains ahead of us

In the period immediately following the government's announcement on the re-opening of much of the leisure and hospitality industry on 4th July, the average national mood nudges up to 6.7 – with a bigger increase evident in the % of those rating their mood at 9 or 10 / 10. However, the nation remains divided and the proportion of adults believing the worst is ahead of us grows for the second consecutive week, standing at more than 1 in 3 – reinforcing the sense that the lifting of restrictions is a divisive issue: a relief for some, but a source of anxiety for others.

Confirmation of re-opening prompts spurt in UK holidays and restaurant dining intentions

The re-opening confirmation has coincided with a 4pt increase in the % of 'Travel Activists' who intend taking a staycation by the end of the summer holiday period and a 6pt increase in the proportion who anticipate a domestic holiday before year-end. No doubt partly linked to the pent up demand for staycations, the restaurant dining market also sees a significant jump in anticipated participation for both July and August.

Average lead times for international holidays continue to shorten

The average lead time for taking an overseas holiday has dropped sharply over the last 2 weeks, but this is from a lengthy starting point. Despite news around key destinations becoming accessible to UK holiday-makers, so far there is an only modest increase in the incidence of 'Travel Activists' intending to take an international holiday this side of 2021. Similarly, average lead times for booking a flight drop for the 4th time in the last 5 weeks, but on short term intentions, we record only small shifts from week-to-week.

Re-opening of hotels coincides with significant uptick in short-term booking intentions

Among 'Travel Activists', intention to book hotel accommodation in July, August and September sees a notable increase. For July, the % intending to book rises from 6% last week to 11% this week. However, for context, the July figure stood at 11% in early May, so while the improvement in outlook is certainly good news, it amounts to a recovery to where we expected to be several weeks ago, for the first month of the summer holidays.

Avoidance of rail services grows again – for both commuting and leisure

Net decline in anticipated usage of train services grows once again this week, among our Travel Activist sample. Relative to the pre-pandemic period, there is a 12pt drop in anticipated future usage of rail services for commuting, and a 21% drop for business or leisure journeys. There is also greater avoidance of underground and tramway services this week. Cycling remains the transport mode with the biggest uplift for commuting. For personal travel, residual avoidance of going out means that all transport modes (except cycling) record a net decline in anticipated future usage.

16% of UK consumers feel they are struggling with their finances – a new post COVID high

The % of UK adults who describe themselves as 'struggling financially' rises for the second consecutive week, to a new high of 16% of the population. Cross-analysis indicates that those aged 35 – 44, families with children and London residents are among the groups most likely to be struggling right now. For a sizeable section of this struggling group, it is a new experience: 45% of them say that they have rarely or never struggled in the past. 65% of this group say that they don't like to think about their financial situation.

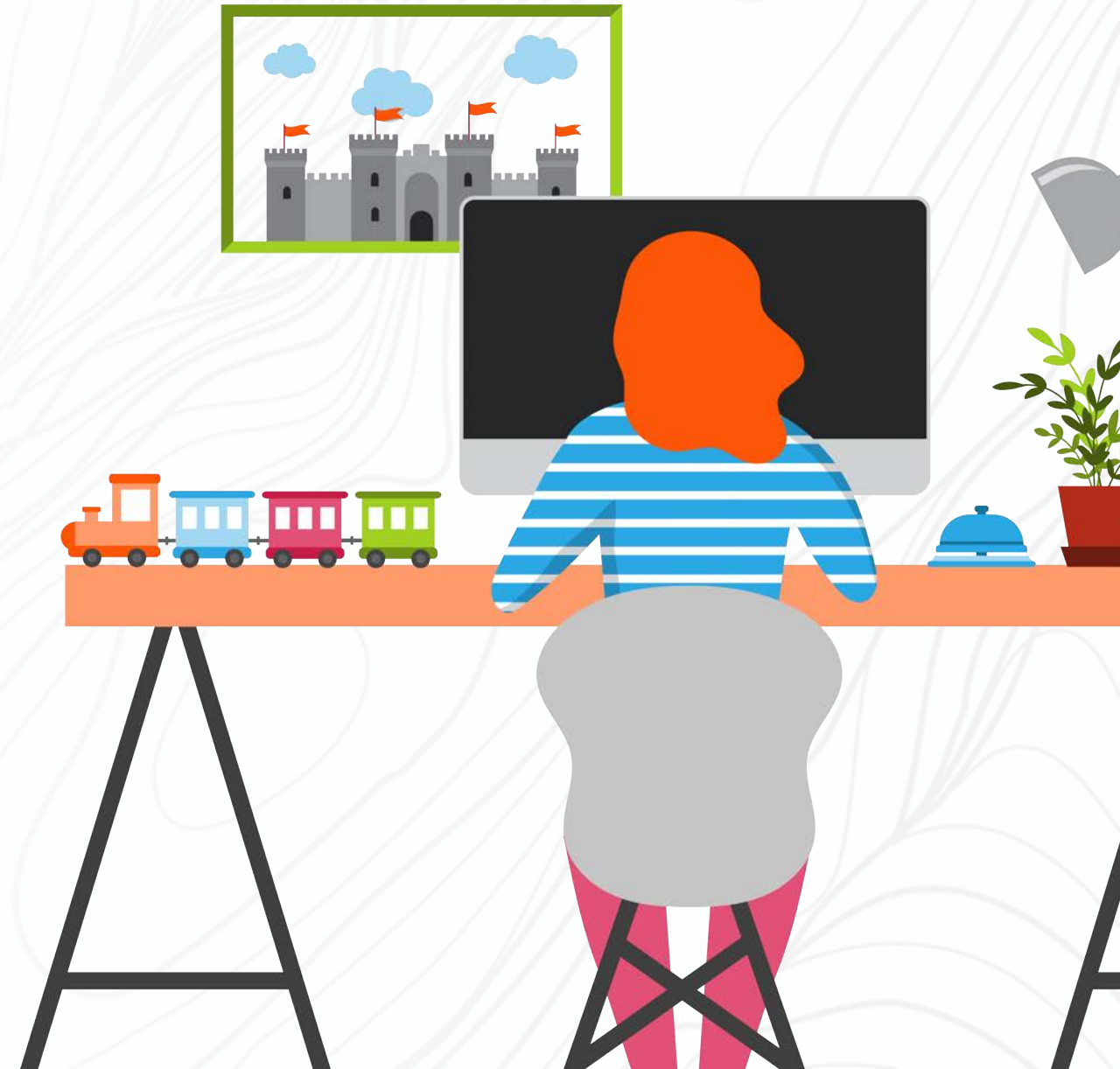
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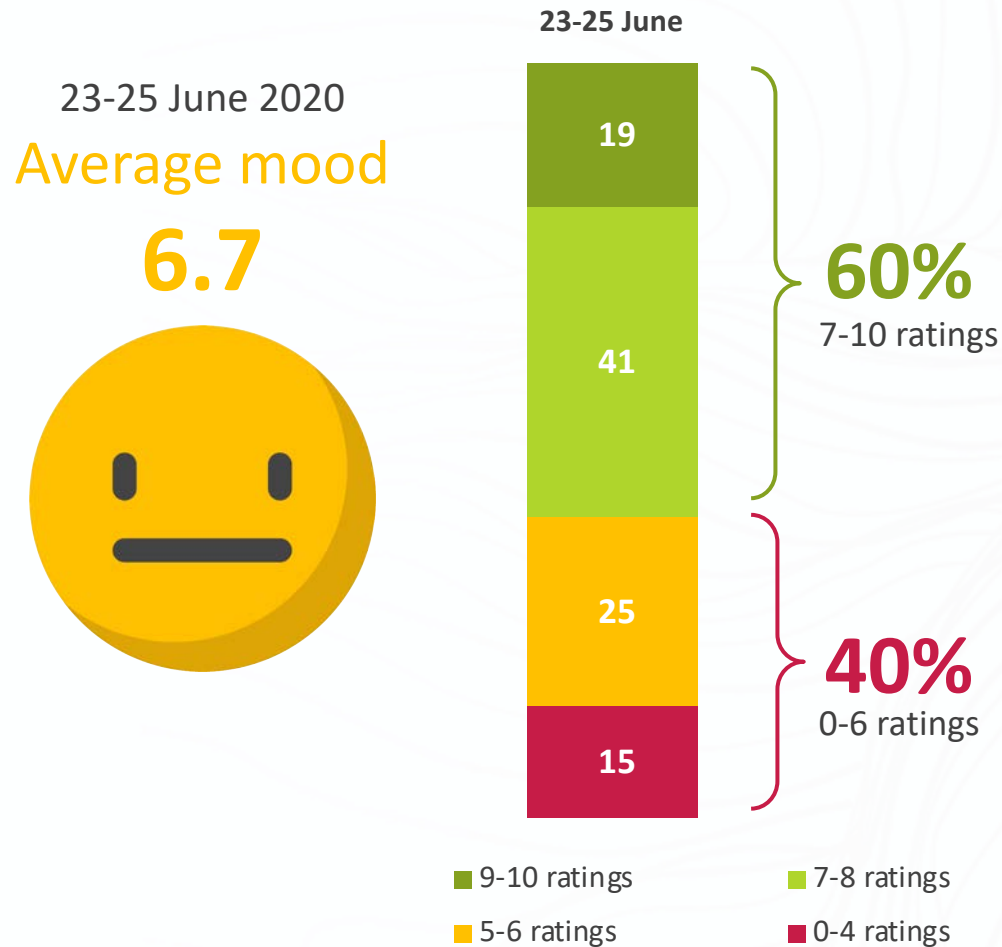
The mood of the nation



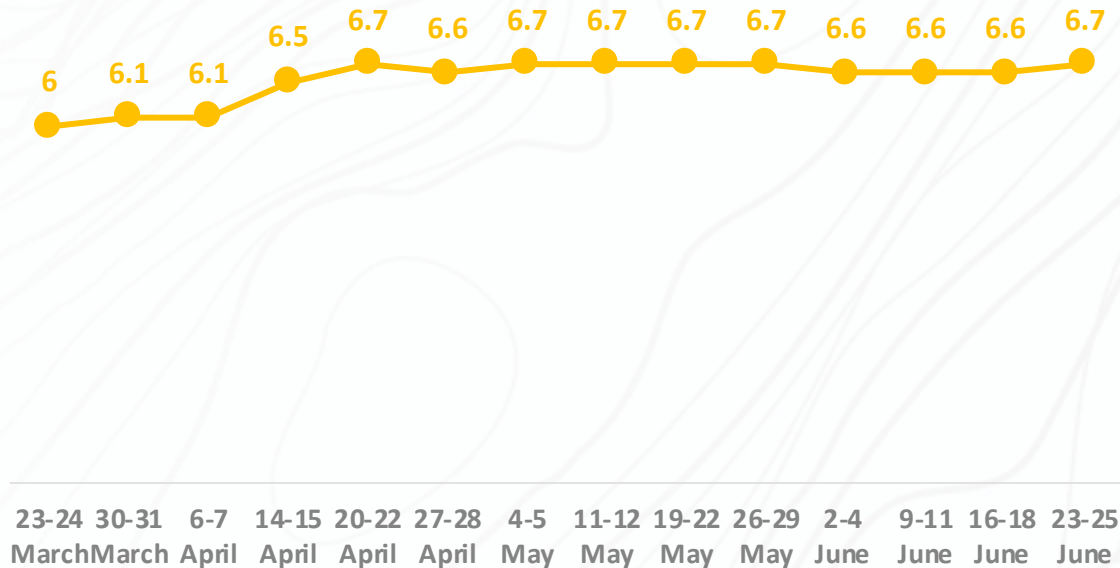
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As we prepare for the re-opening of much of our leisure economy on 4th July, the upward shift on 'average' mood is modest, but there is a notable + 4pt increase in those who rate their mood at 9+ / 10.



Average mood week-on-week
(UK Adults)

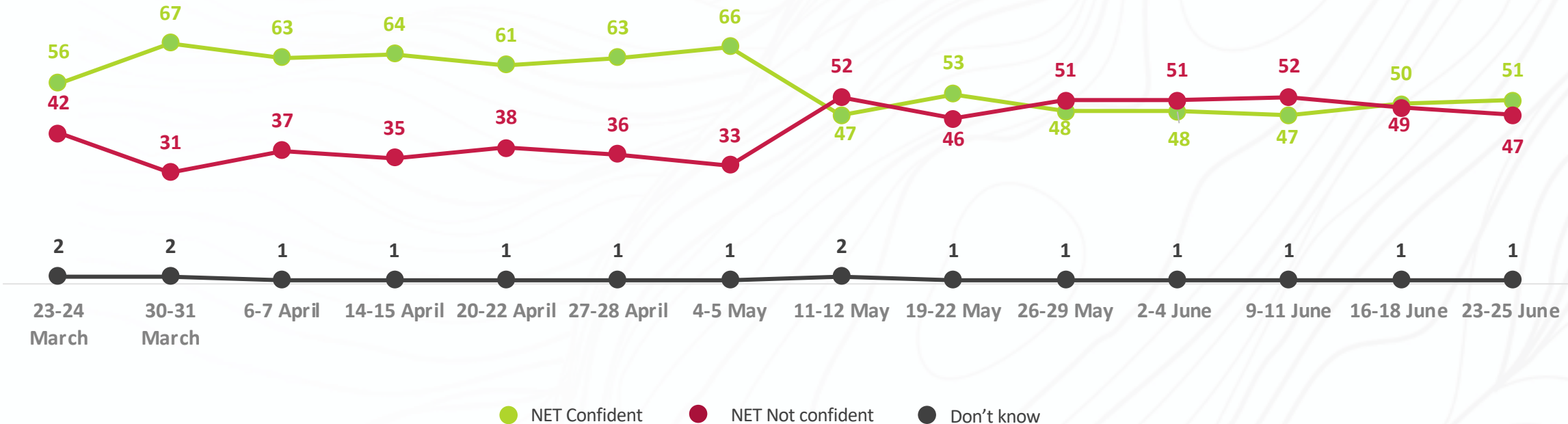


Q5: How would you rate, between 0 and 10, your mood today? (%)

Perceptions of the UK government’s handling of the crisis improve for the 2nd consecutive week, though remain substantially weaker than earlier in the crisis.

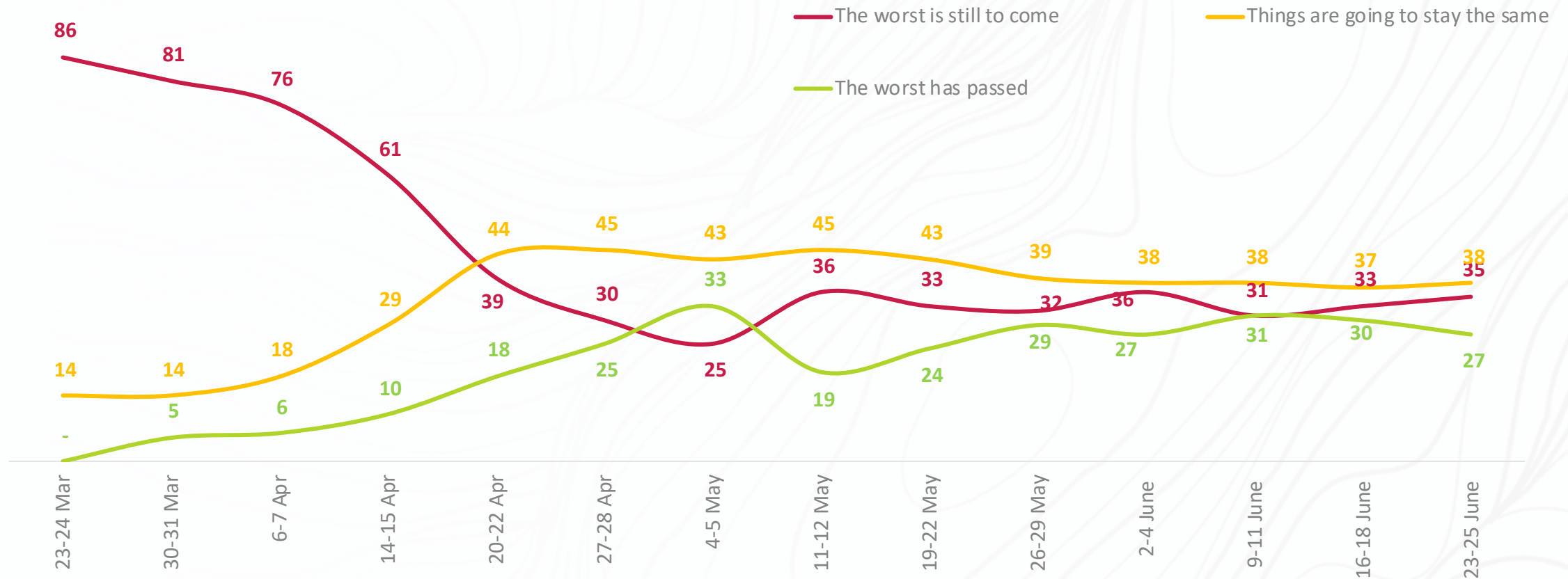


Q6: Would you say that you are completely confident, somewhat confident, not really confident, not at all confident regarding how the British government is handling the crisis? (%)



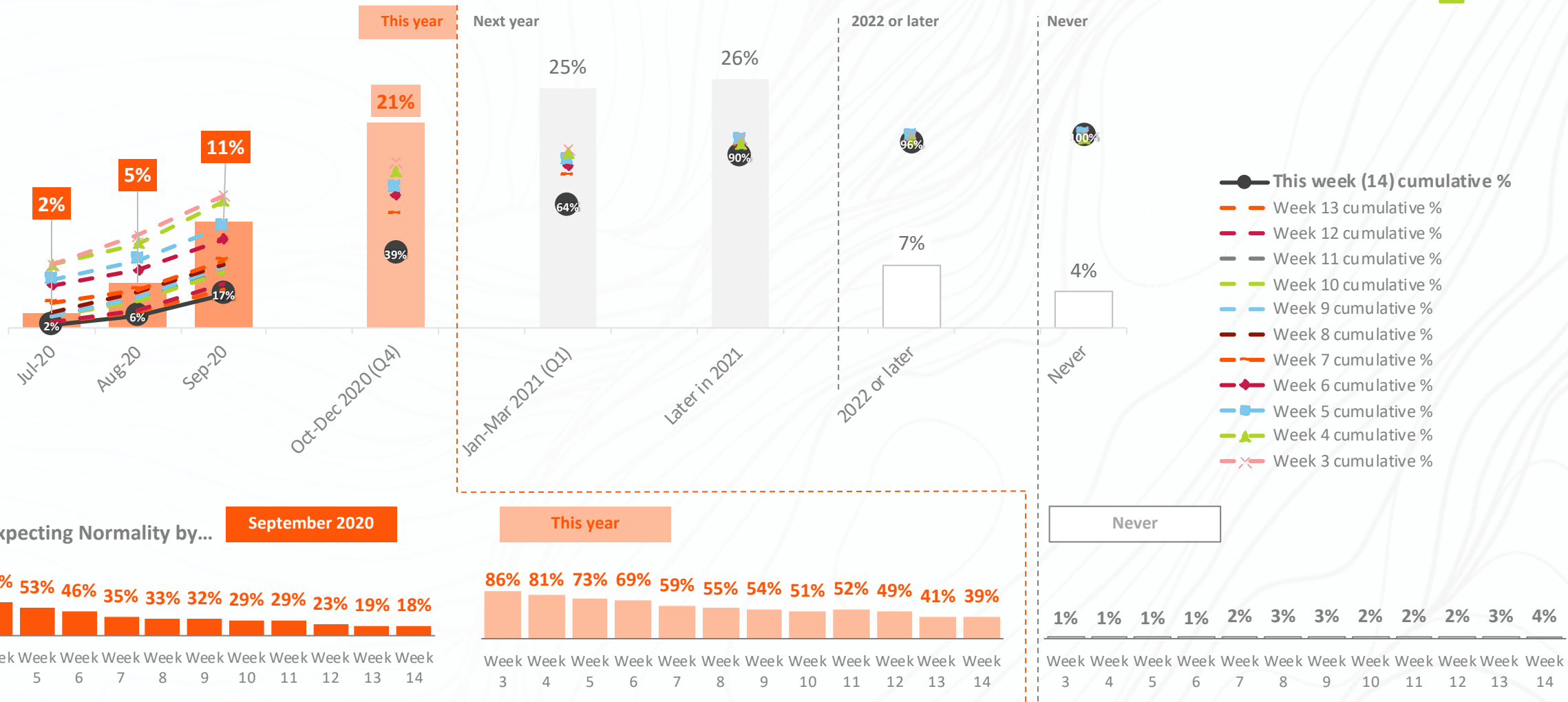
Q6: Would you say that you are completely confident, somewhat confident, not really confident, not at all confident regarding how the British government is handling the crisis? (%)

The proportion of adults who fear *the worst is still to come* or that *things are going to remain the same* remains stubbornly high. The proportion who feel *the worst has passed* has not yet exceeded 1 in 3 and currently hovers above 1 in 4.



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

The trend continues. Each week, fewer of us expect normality to return this year. This week, though, the proportion thinking it'll never return increases again



From social media: Key themes underlying positive and negative sentiment

Great news that Blackpool illuminations have been extended 2 months this year running into beginning of January next year Two @visitBlackpool @VisitLancashire @PBB2017 @Pleasure_Beach @3LeggedThingWinston @BpoolCouncil @VisitEngland

Supporting service continuity

Fantastic to see all the hard work going into the East Coast Upgrade even in challenging times.

Supporting service continuity

In a first for a UK airport, Manchester Airport are now letting passengers book a time slot to get through security. It's to try and reduce queues as passengers have to social distance #CapitalReports

The future

Theatres in the UK are collapsing while those in Europe are reopening. It's a hugely successful sector and the investment we need is less than a third of the bailout given to the big 3 airlines. We can bounce back, but help has to arrive fast because we're going bankrupt. #bbcaq

Loss of service continuity

Corbin & King launches meal delivery service to help top-up furloughed staff wages Coronavirus #hotels #business #occupancy

Innovation

BT Sport are also using FIFA crowd noise for Premier League games today. It seems to be better mixed than Sky Sports, with crowd reactions at roughly the same time as big moments on the pitch

The future

@TravelodgeUK "To minimise contact, housekeeping teams will not enter bedrooms during your stay" - so this means rooms won't be serviced during a stay? No new towels, no change of bedding, cleaning bathrooms? This sounds like cost cutting.

Failing systems

@EasyJet 6 weeks ago today since you cancelled our flights. I fully understand the circumstances and fully understand the reasoning behind the cancellation, however the fact we've heard absolutely NOTHING from you now feels like you're taking liberties. Any info?

Failing systems

@MartinSLewis we have had 2 holidays cancelled this year due to COVID-19 @easyJet have been really good with refunds so far but my mother-in-law is struggling to get anywhere with @loveholidays and booking.com both don't seem interested in refunding.

Failing systems

Travel and leisure

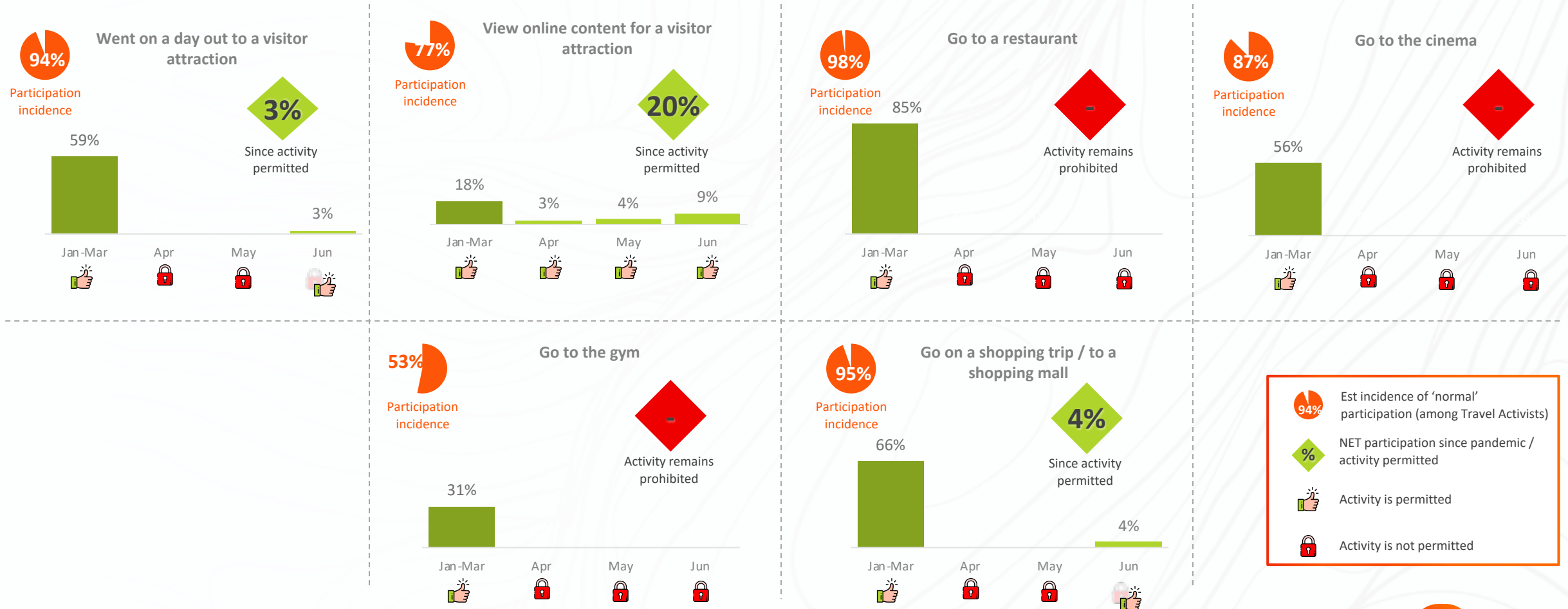


Market Recovery Tracking: Week 1

To what extent is consumer participation in each activity sector recovering to 'normal' levels?

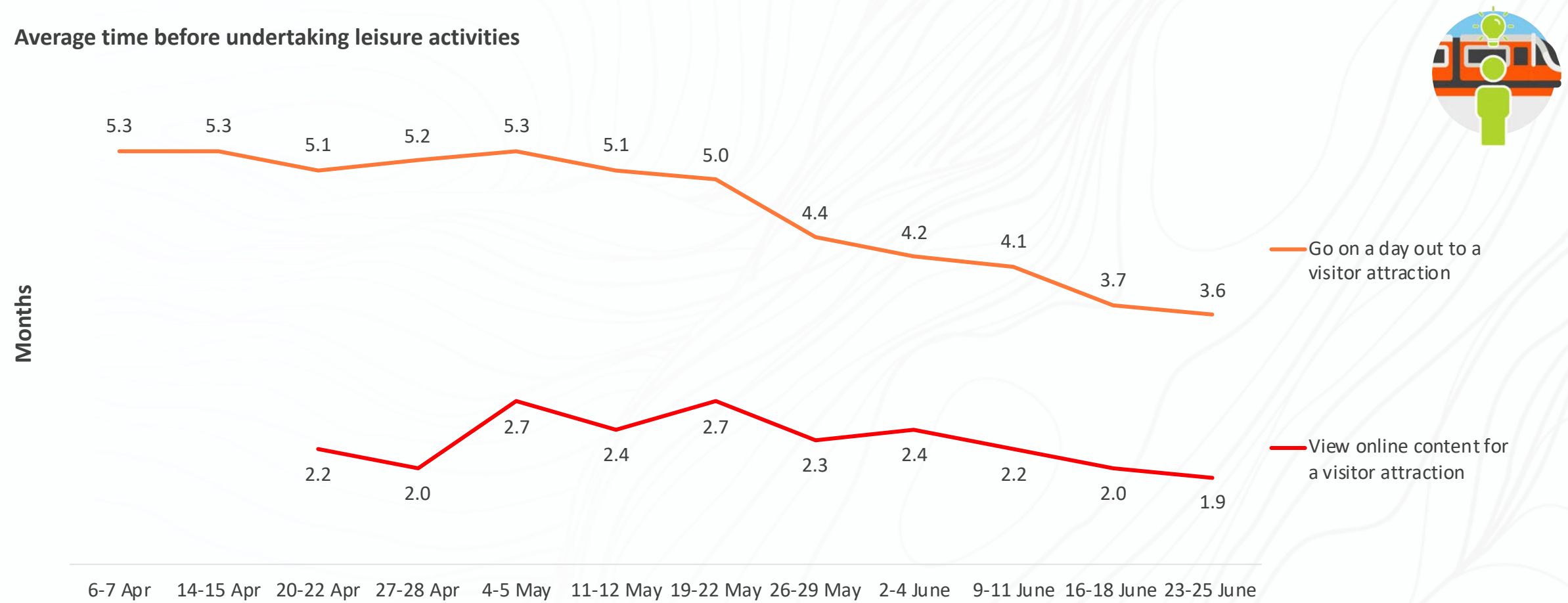


In 'normal' times, we estimate that there is a near universal (94%) participation incidence in the visitor attraction market among our 'travel activist' cohort. 59% of travel activists visited an attraction in Q1 2020. Since the re-opening of our attractions, approximately 3% have returned to visit so far.



On average, travel activists say that it will be 3 – 4 months before they next go on a day out to an attraction. The lead times continue to drop, but the curve flattens this week, indicating that we may be getting closer to ‘normal’ lead times

Average time before undertaking leisure activities



The proportion who plan on going to a visitor attraction by the end of August dropped back to 28% after a jump the previous week



A few weeks after the re-opening of many outdoor attractions, intention to go on a day out to a visitor attraction appears to have softened with intention to visit by end of August falling after a spike last week. This perhaps reflects people’s choice of activities expanding in the next few weeks, with other venues, such as restaurants and cinemas, reopening.

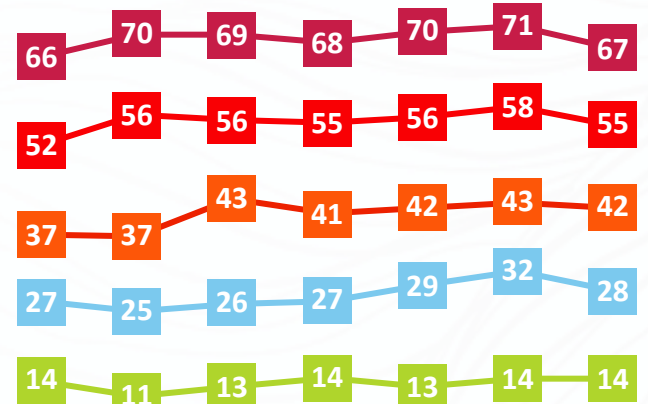
Go on a day out to a visitor attraction

View online content for a visitor attraction

This week

3.6

Average time before the activity

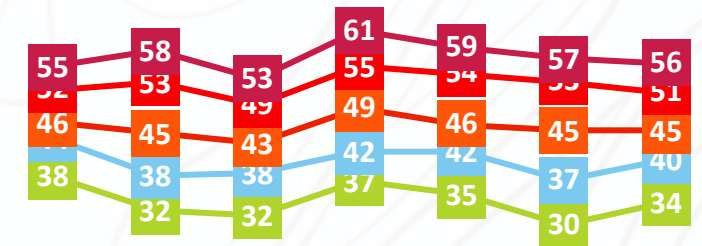


11-12 May 19-22 May 26-29 May 2-4 June 9-11 June 16-18 June 23-25 June

This week

1.9 months

Average time before the activity



11-12 May 19-22 May 26-29 May 2-4 June 9-11 June 16-18 June 23-25 June

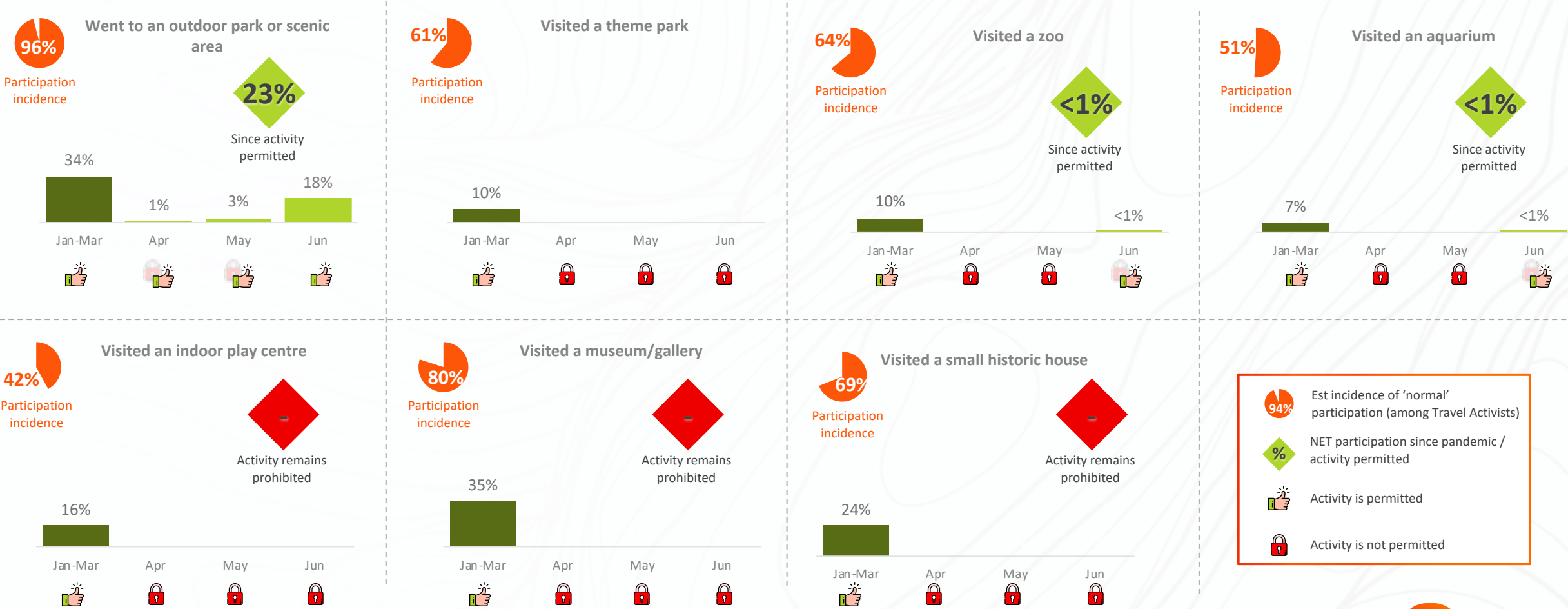
- Planning on doing it but don't know when
- By end of April 2021 or later
- By end of December 2020
- By end of September 2020
- By end of August 2020
- By end of July 2020

Market Recovery Tracking: Week 1

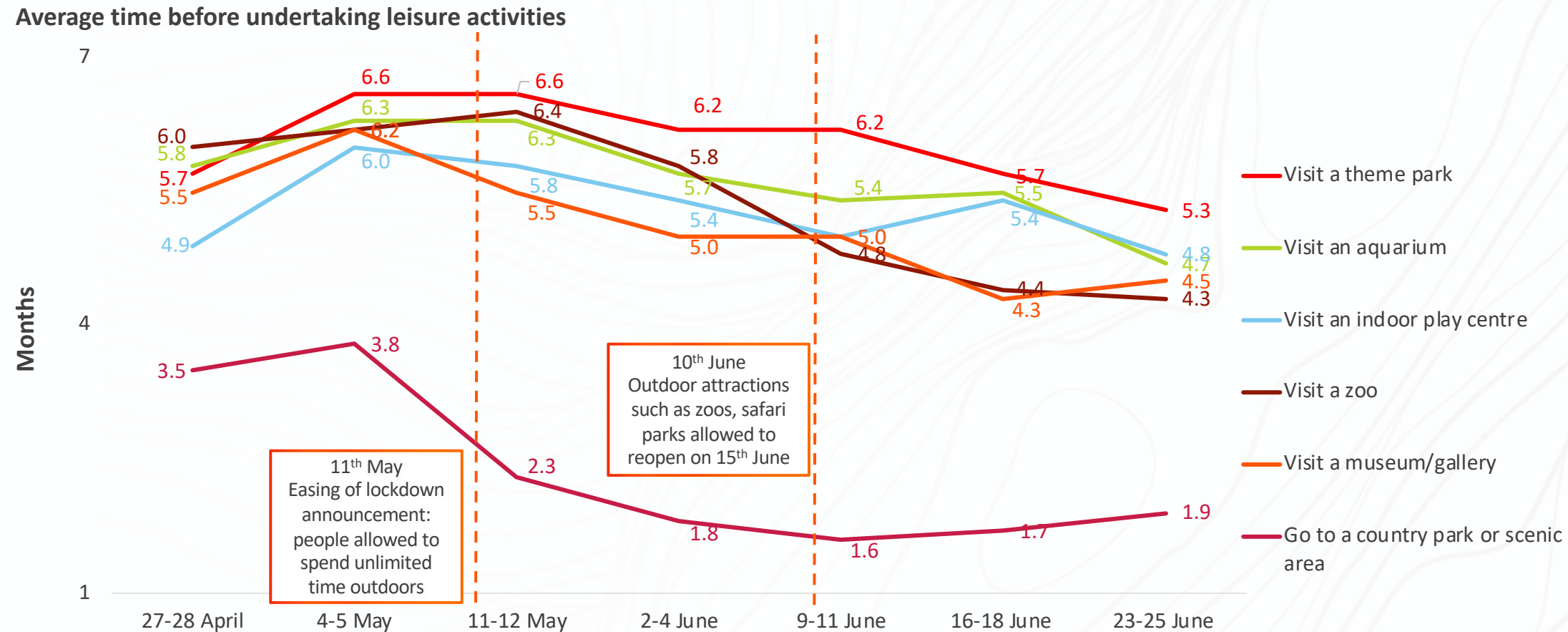
To what extent is consumer participation in each activity sector recovering to 'normal' levels?



Unsurprisingly given that restrictions were lifted at an earlier stage, outdoor parks and scenic areas show much the strongest recovery in terms of incidence of visits.



The average time before visiting a theme park, aquarium or zoo continues to decline. Despite confirmation of their re-opening date, there is no progress to report this week for museums / galleries.



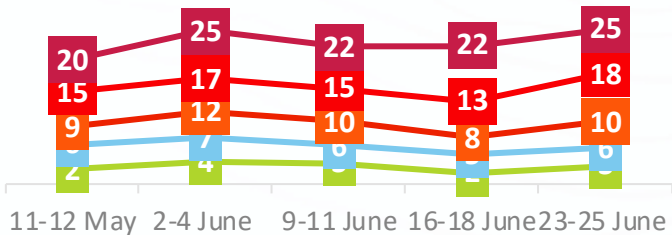
Despite the announcement that indoor attractions will be able to open from July 4th, the average lead time remains more than four months



Visit an indoor play centre



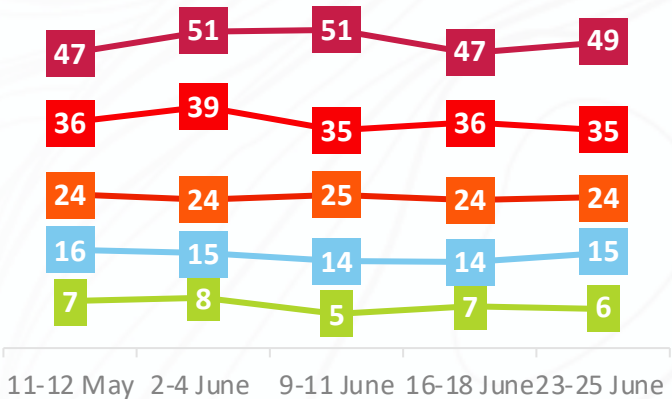
4.8 months
Average time
before the activity



Visit a museum/gallery



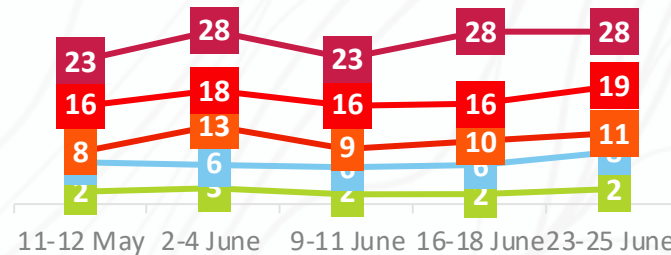
4.5 months
Average time
before the activity



Visit an aquarium



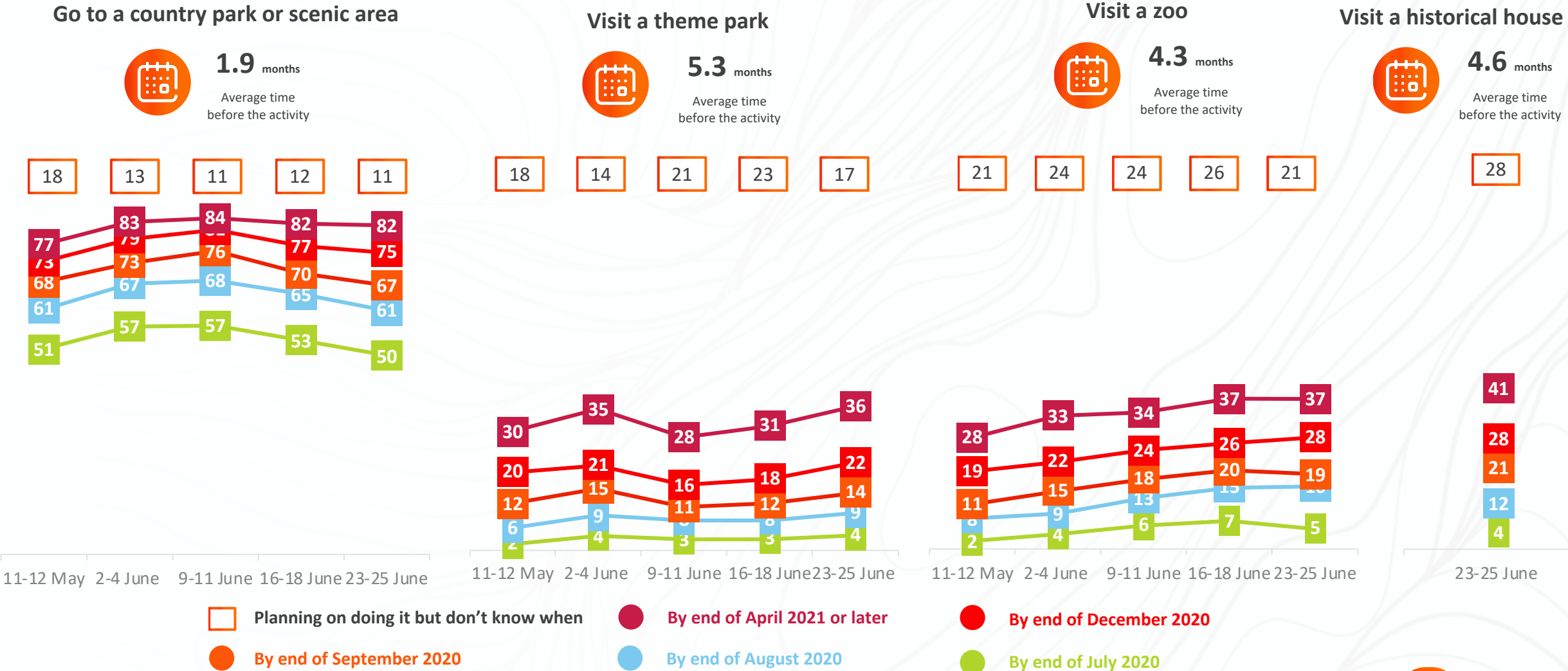
4.7 months
Average time
before the activity



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

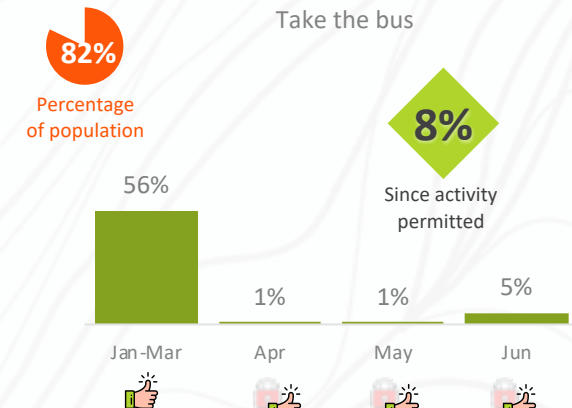
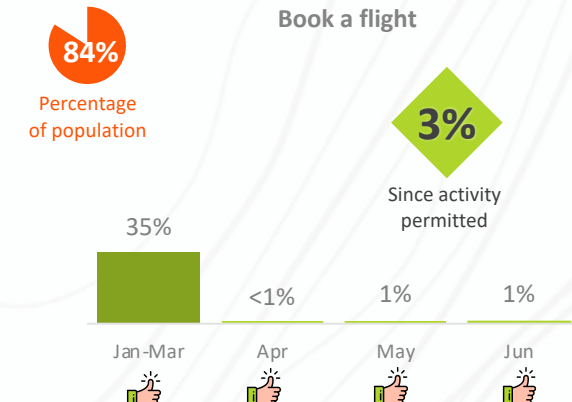
- By end of April 2021 or later
- By end of December 2020
- By end of August 2020
- By end of July 2020

Intention to visit a theme park by the end of summer increased for the second consecutive week. Intentions to visit country parks and scenic areas in the immediate future drop back



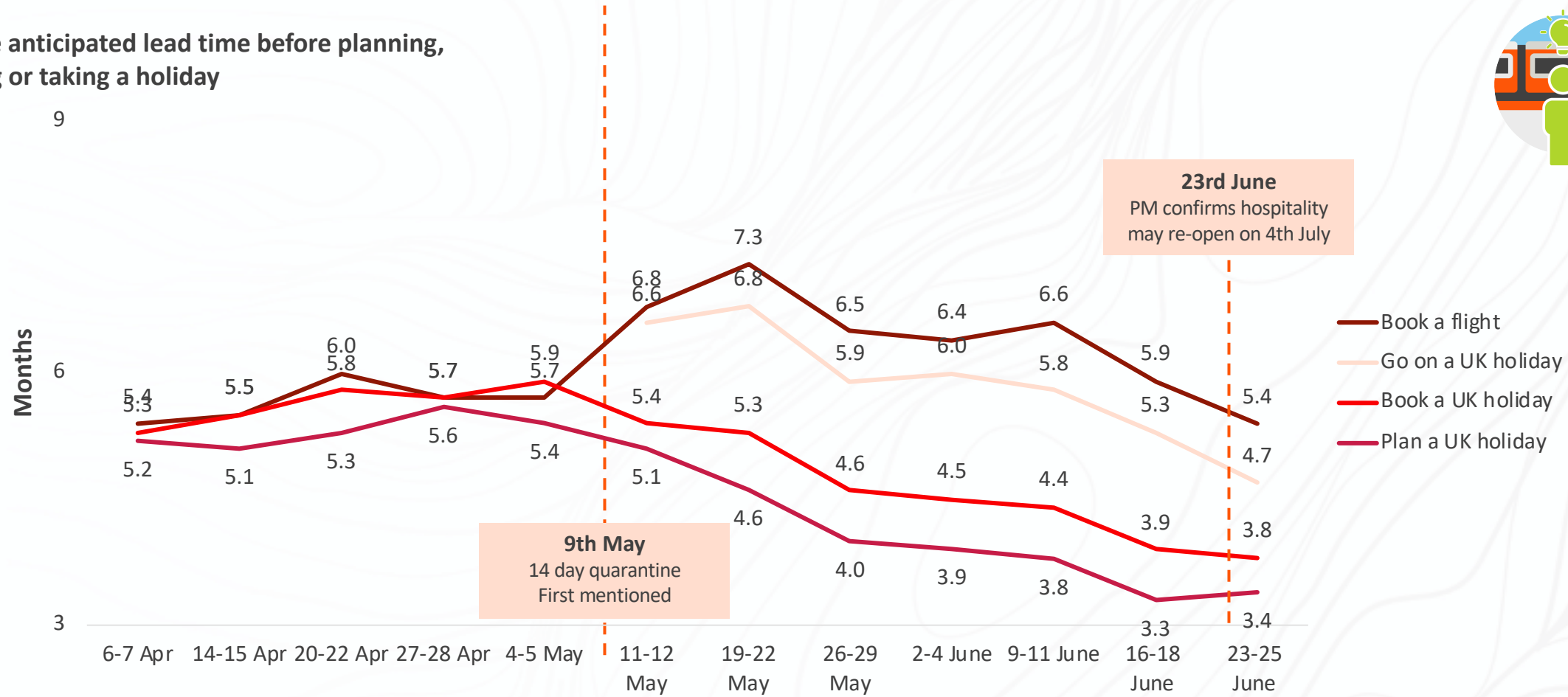
To what extent is consumer participation in each activity sector recovering to 'normal' levels?

- 94% Est incidence of 'normal' participation (among Travel Activists)
- % NET participation since pandemic / activity permitted
- Activity is permitted
- Activity is not permitted



Unsurprisingly, the average lead time for going on a UK holiday dropped by the largest margin seen in the past 4 weeks. Anecdotally, travel companies have seen a surge in bookings.

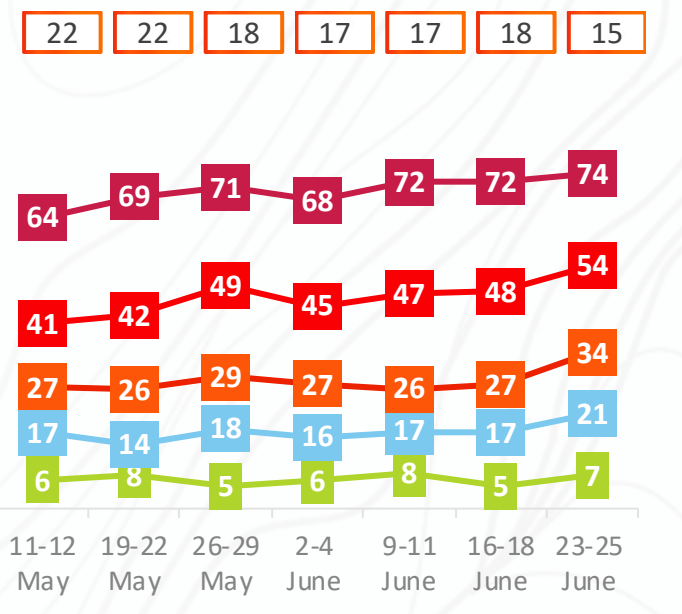
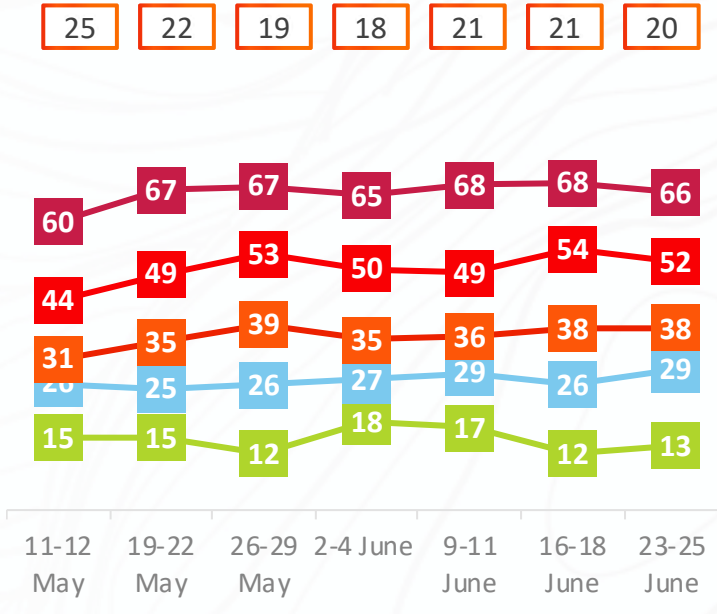
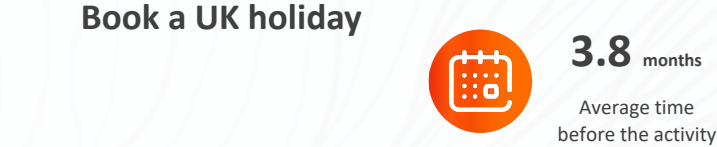
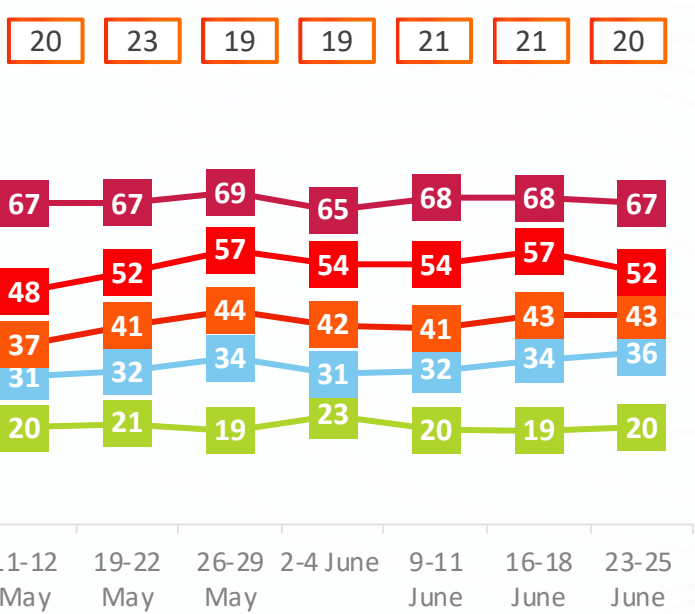
Average anticipated lead time before planning, booking or taking a holiday



Intention to take a UK holiday is moving in a positive direction, with over a half likely to take a holiday by end of the year, the highest proportion recorded since the start of tracking



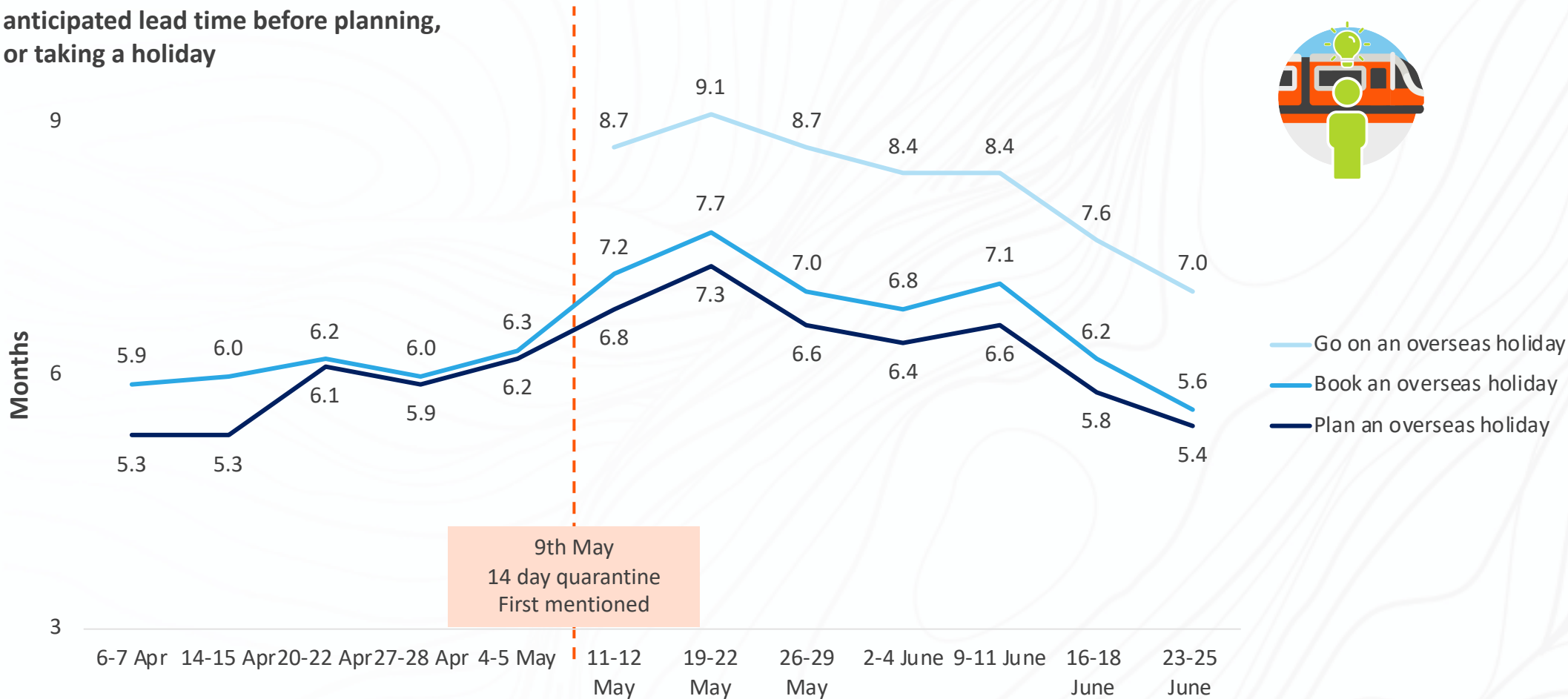
Last week’s announcement that self-contained accommodation including hotels, B&Bs and campsites could reopen from the 4th of July has driven an uplift in intention to go on a UK holiday, with 1 in 5 likely to take this holiday by as soon as the end of August.



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

The typical lead time for taking an overseas trip has dropped by almost a month compared to two weeks ago

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



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

The proportion anticipating taking a summer overseas trip remains consistently low but likely to pick up after recent government announcements

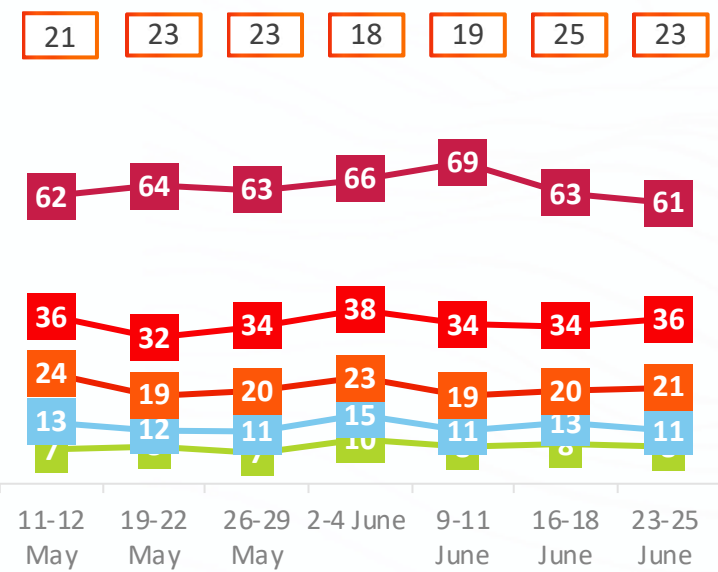


Plan an overseas holiday



5.4 months

Average time before the activity

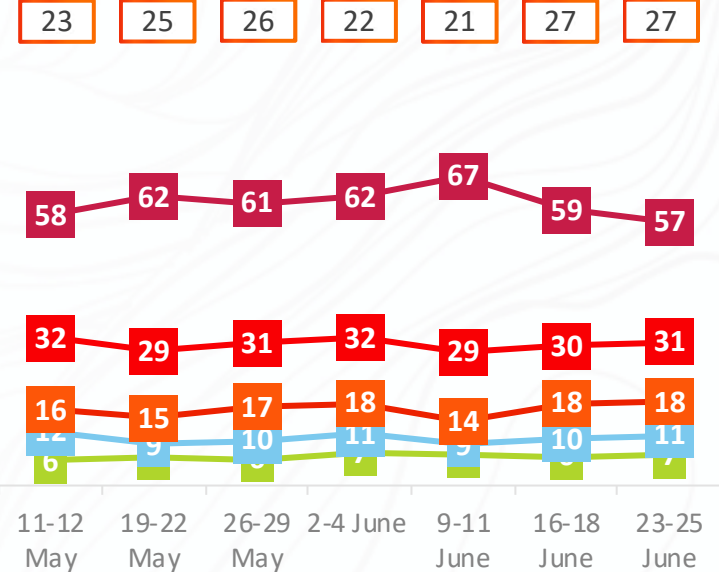


Book an overseas holiday



5.6 months

Average time before the activity

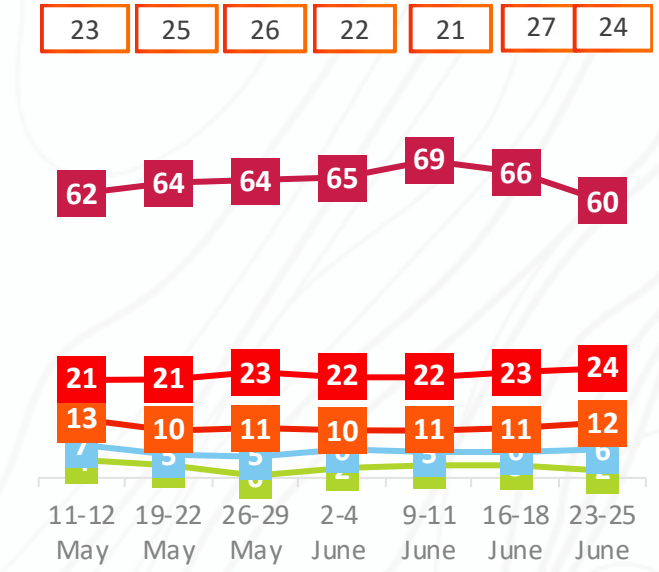


Go on an overseas holiday



7.0 months

Average time before the activity



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

On social media – Despite the growing excitement to start booking holidays again, people are seeking answers which are crucial to planning. TUI customers are still dissatisfied with the lack of refunds and customer service

“

Hi Richard, what's your view on **UK** package holidays to Thailand this summer? We are booked to go with **TUI** on 11 Aug. As all flights to Thailand are currently banned do you think our holiday will be cancelled as Brits still won't be allowed into the country?

“

@TUIUK Despite cancelling our holiday on the 16th of April we still have not received our balance refund!! Although we understand refunds of holidays cancelled by yourselves **Tui UK** are being given in date order we cancelled by our own choice and still have not been refunded???

“

@TUIUK Will you please respond to my private message to yourselves, I find it extremely unprofessional to use message bots given the amount of monies you owe many many people. Also, when do you expect your **uk tui** stores to be reopening?

“

@SimonCalder latest correspondence from **TUI** states that our Sept hol won't go ahead if quarantine still in place on return to **UK**. What's your thoughts on this? Is it legally sound? I'd have thought our decision on whether we can manage quarantine?

”

“

We are also having a problem, we want to cancel our holiday, they are asking for the balance to be paid, but I have tried every way possible to contact them, with no success. Come on **Tui** this is not good enough

”

“

I note that @TUIUK still hasn't had the decency to even acknowledge or reply to this!! **#tui #fail**

”

“

'Still speaking' Blatant lies. Same from Virgin, 'had no contact from Disney', give over. ALL other UK travel agents have been in touch with Disney, then been in contact with customers & given them options. The radio silence from Tui/Virgin speaks volumes. Shocking customer service.

”

“

@TUIUK when **TUI UK** start flying again will Jamaica be back on your list of destinations. I'm due to go on the 1st August

”

“

If my £400 is not returned to me then I shall go to the small claims court and get a ccj against **tui uk**

”

”

“

Need confirmation whether or not you will be continuing the contract with Tui UK at the Tam for 2021, would love to re book our cancelled trip.

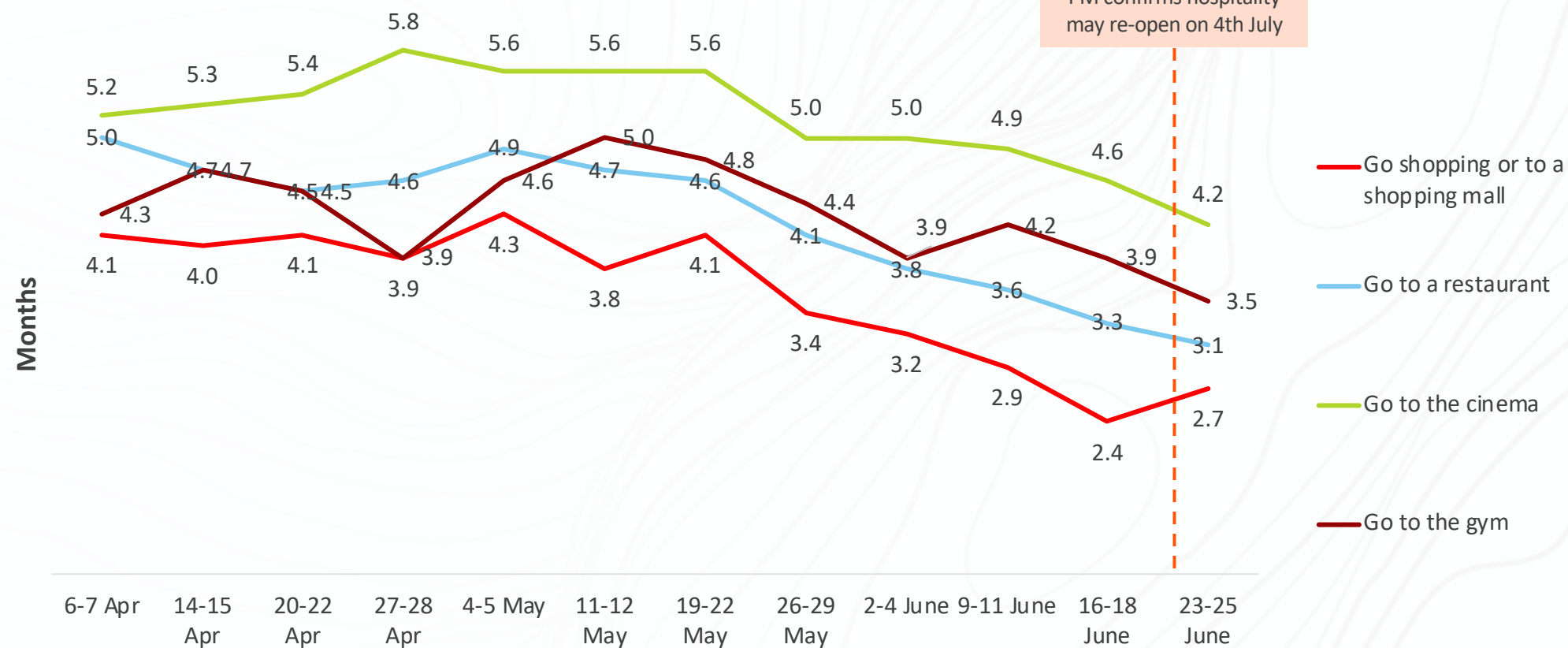
”

The lead time for dining in a restaurant continues to drop in line with restaurants being allowed to open July 4th



Average time before undertaking leisure activities

23rd June
PM confirms hospitality
may re-open on 4th July



On social media – many were glad to see the return of Premier League football on their screens last week. Some thought the absence of a real crowd affected the atmosphere of the game, whilst others pined to be in the pub. Others questioned the government’s priorities, suggesting they would rather know when they could visit loved ones than watch football.

“ Glad to watch the first #PremierLeague football match in England for more than 3 months - It's Aston Villa versus Sheffield United and being played in an empty stadium after the season was brought to an abrupt halt by the #coronavirus pandemic. ”

“ The FA/Football clubs in the UK need to take one thing away from this return of #football... the game is absolutely nothing without fans. No atmosphere has lead to little intensity in the games I've seen so far from @premierleague's return. ”

“ That's it! I've lost Hubs on weekend mornings! @prehas resumed in the #UK! #premierleagueUK ”

“ Nope, I've seen enough! Figured I don't actually miss the premier league, I just miss going to the pub to watch the premier league!! ”

“ Yeah I agree there's more risk off I've than on. That's down to the clubs and the players to be sensible. The premier league here in the Uk have nailed it. All disinfected balls on cones so new balls are used every time it goes out of play etc. You'll never eradicate risk 100% ”

“ Who else is excited that Premier League is back?? ”

“ I'm a massive football fan. I'm excited for the #PremierLeague to return, BUT I find it incredibly patronising & demoralising this being a leading subject of today's Coronavirus update. I'd much rather know when I'm going to be allowed to hug my Grandma thanks. #DailyBriefing ”

“ Just watching the coronavirus government daily briefing and absolutely disgusted that #PremierLeague seems to be far more important to our #UKGovernment than anything else! Give us strength! The same goes for our media. ”

“ I love Amazon Video & even more since you started showing UK Football BUT you MUST get some sort of channel or app so I can see what's coming up. It's pure chance I discovered you're actually going it be showing some Premier League games. Why didn't I find this out from you?!!!! ”

“ Yes ... the crowd noise could be better (I mean cheer when a goal is scored? Is the man pressing buttons asleep?). But! I like it, if you don't your one of those people who goes down the pub and watches the game in silence with music on instead. Heathen. #PremierLeague #MCIARS ”

Intention to go to a restaurant by the end of August is now at its highest point



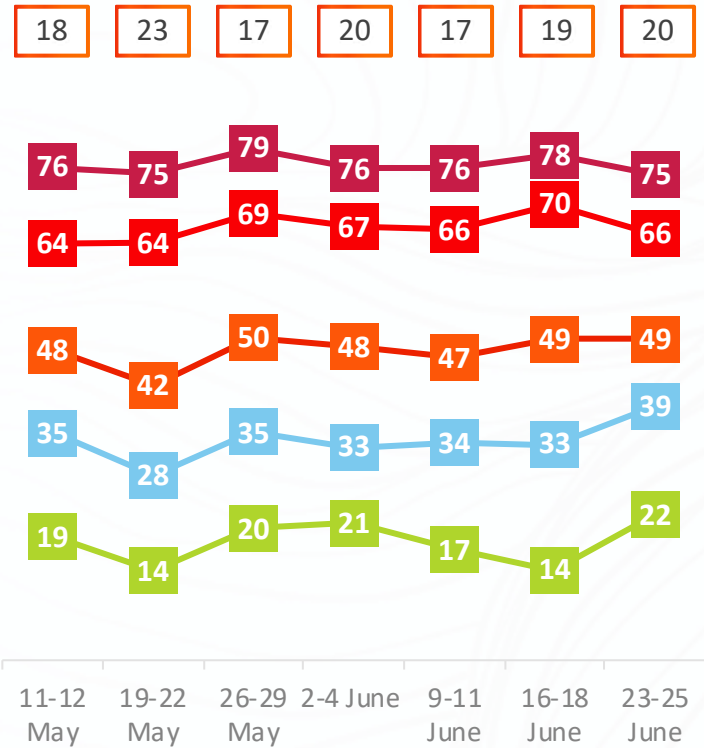
Linked to the government’s announcement of reduction of the 2 metre rule and that restaurants can re-open from July 4th, we have seen a steep increase in intention to go to a restaurants by end of July, with just over 1 in 5 intending to so. As consumers begin to hear success stories of reopening restaurants from this weekend we are likely to see intention increase even further in the following weeks.

Go to a restaurant

This week

3.1 months

Average time before the activity

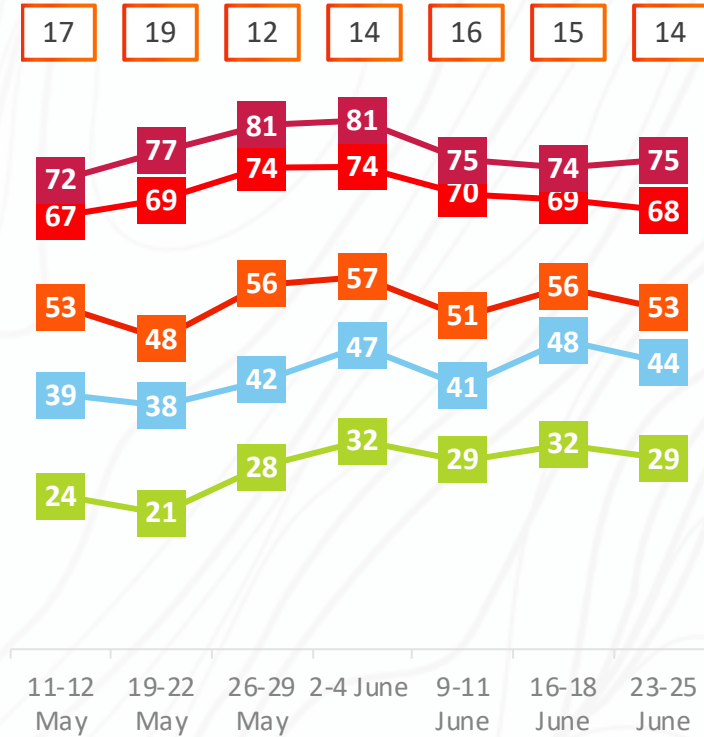


Go shopping or to a shopping mall

This week

2.7 months

Average time before the activity



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

On social media – the public are becoming impatient waiting for restaurants and bars to open, with many pre-booking their favourite eateries in advance, whilst others raise their frustration over drive-thru queues. Some concern is shown with regards to the logistics behind reopening such as social distancing.

“ Ok, I’m desperate from the restaurants and bars to reopen in the UK lol #lockdown2020 #LockdownThirstday ”

“ I agree. I saw there is a plan afoot in London to use the car parks as outdoor drinking/dining spaces but I want to walk up to a bar and order a pint. Just like the good old days! I’ve taken to photographing pub interiors for comfort. ”

“ These restaurants need to get their websites in order cause I’m ready to pre book everywhere I wanna go ”

“ Pre booked miller & carter for July and I cannot wait to eat in a restaurant all dressed up ”

“ @EveningStandard Don’t understand central London restaurants opening, I welcome it, but customers are all working from home / City’s on lockdown ”

“ Just had a Greek takeaway and it was PHENOMENAL 10/10 🍷 cannot wait for restaurants to open ”

“ If July 4th is going to happen, that’s 2 weeks to set up restaurants, train staff on changes, engage suppliers, clean, prep, restock, purchase specialist covid equipment....@BorisJohnson do you think we might get some notice on this please? ”

“ I won’t be rushing to the pub or restaurant when they open in sure some people will you only have to look at the queue at McDonald’s to see that there are a lot of idiots about ”

“ Does anyone know which #london #restaurants have started taking bookings? @OpenTableUK only hosts the biggest it seems. I cannot wait to hoist a forkful of food up to my mouth that I haven’t cooked with my own two hands or had delivered ”

“ The issue of social distance is crucial for restaurants looking to reopen. The difference between 1 and 2 metres is the difference between total failure and just about staying afloat. ”

“ @francisobrienUK Definitely not! Look at the ridiculous McDonald’s queues! ”

We see the proportion intending to visit a cinema by the end of September at its highest level



A number of cinemas across the UK are set to reopen on 4th July, though according to the Independent Cinema Office, only 13% of its surveyed venues are likely to be opening in July. This limited capacity, combined with the release dates of blockbuster movies having been pushed back, may mean intention is lower owing to supply rather than demand.

Go to the gym



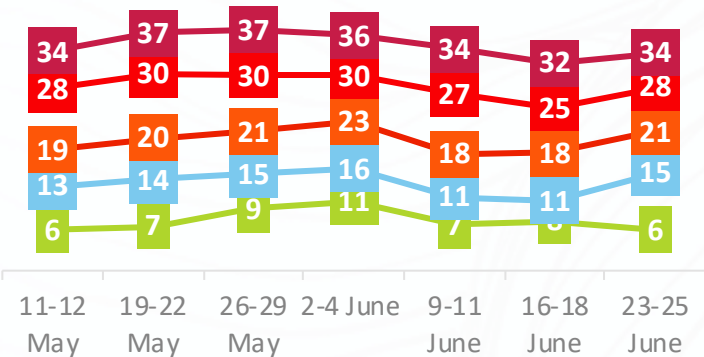
Go to the cinema



This week

3.5 months

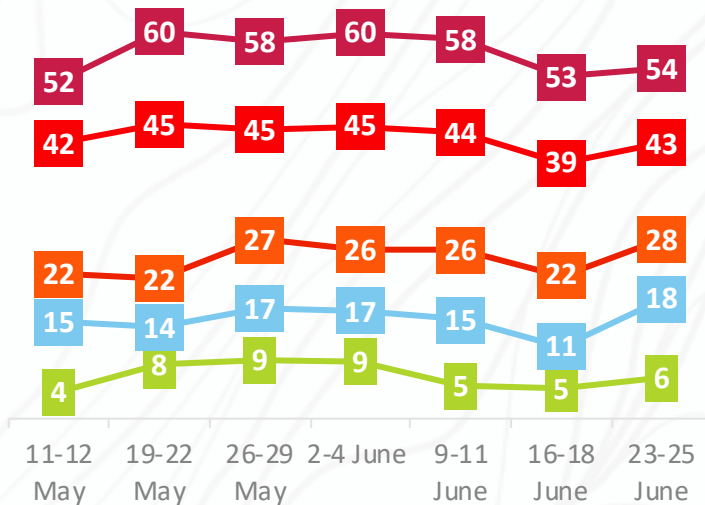
Average time before the activity



This week

4.2 months

Average time before the activity



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

As anticipated last week, there is a significant uplift in short term hotel booking intentions – almost doubling for July among our ‘travel activist’ cohort.



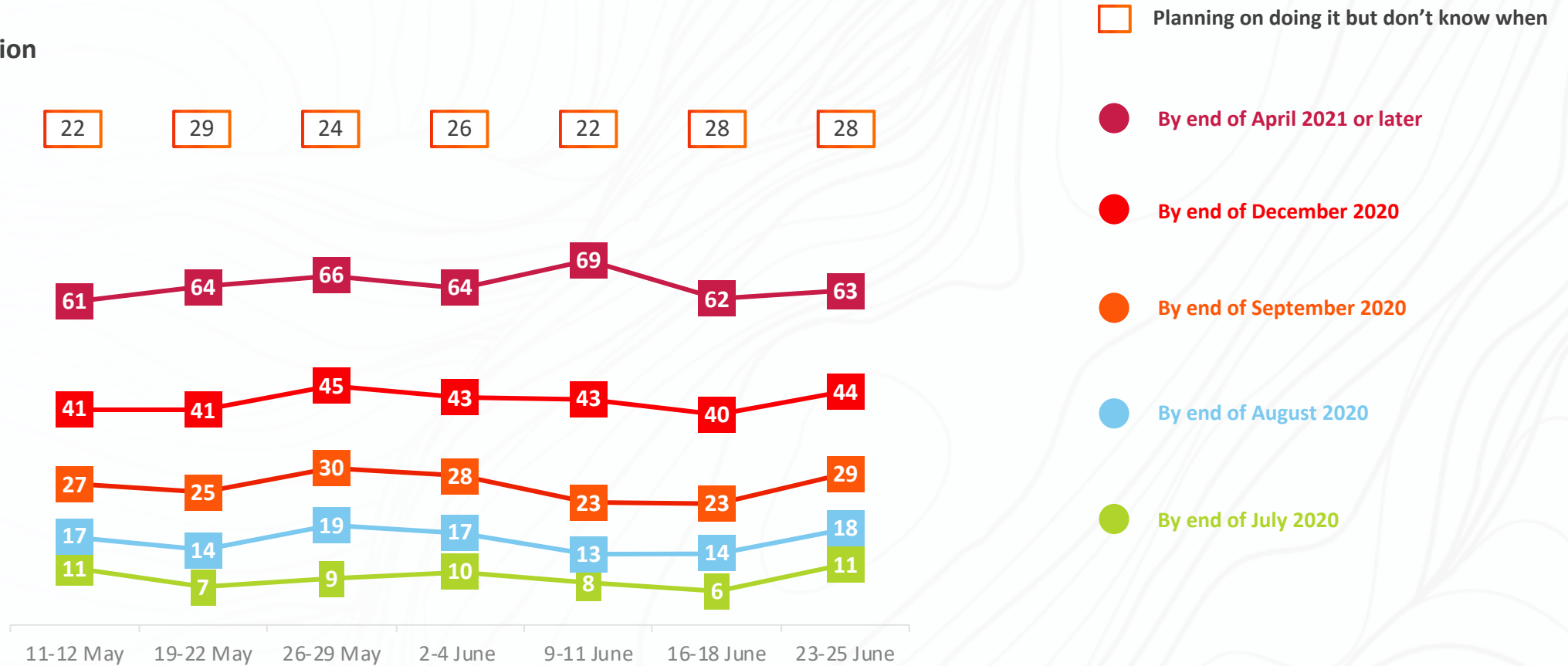
- With the 4th July confirmed as the opening date for hotels, we might be seeing the beginning of a surge in short-term usage expectations, with the proportion thinking they'll do so by the end of July climbing back to its previous high point and both end-August and end-September getting close to theirs. Is the sleeping giant about to re-awaken?

Book hotel accommodation

This week

4.5 months

Average time before the activity



On social media – hotel brands heavily promoted their various quality assurance / cleanliness programmes



Premier Inn @premierinn · 19 Jun

We're super busy ensuring everything is ready for when our doors can reopen. But while you wait, now couldn't be a better time to start planning – what will you do? The UK's the place to do it all so let us know! ✨ 🍷



Marriott International @MarriottIntl · 6 May

Introducing Marriott's Commitment to Clean, our new initiative that aligns with expert health & safety protocols. Watch our video to learn more about how we're working to provide a cleaner, safer environment for our guests and our associates. bit.ly/MIClean



Radisson Hotels @RadissonHotels · 20 May

Taking care of one another is what hospitality is all about. Discover the [#RadissonHotels](https://twitter.com/RadissonHotels) [#Safety](https://twitter.com/RadissonHotels) Protocol in partnership with [@SGS_SA](https://twitter.com/SGS_SA): bit.ly/2TpOMax [#RadissonCares](https://twitter.com/RadissonCares)



Hilton @Hilton · 15 Jun

Introducing the Hilton CleanStay seal. When guests first enter their room, the seal lets them know that their room was professionally deep cleaned since the last guest — and that no one has entered their room since that cleaning. [#HiltonCleanStay](https://twitter.com/HiltonCleanStay)



56

156

427



Travelodge UK

@TravelodgeUK

We can't wait to welcome you back. That's why we're launching TravelodgeProtect+, our programme of cleaning and social distancing measures that will be adopted by our hotels when they reopen for all customers: travelodge.co.uk/protect

On social media – news of the re-opening of hospitality has divided opinion, prompting an immediate intention to book among some, but concerns about a 2nd wave among others.

“

Pubs, restaurants and **hotels** experienced a wave of bookings after the **UK** government announced on Tuesday that they could **reopen** on July 4, raising hopes of a strong bounceback from the pandemic.

”

“

Best Western are aiming to start re-opening their hotels in the UK from the 4th July. I love the #BestWestern brand and have stayed at 13 of their hotels, so I'm taking a look at what makes a Best Western hotel stay so special.

”

“

It's great that the small pubs, restaurants, holiday parks, **hotels** and B&Bs can reopen soon. However, lots of people will be holidaying in the UK, it will be even busier than a usual summer. We have one main hospital serving Cornwall. Uneasy doesn't even cover it Grimacing face #SecondWave

”

“

If the tourism industry doesn't **reopen** soon, there won't be a tourism industry left. **Hotels**, coach companies, tourist attractions etc, are already collapsing [#Shearings](#) [#BayHotelsUK](#) [#LivingCoasts](#)

”

“

Tourism in Scotland is destroyed. England **reopening hotels**, caravan parks, restaurants, theme parks, pubs. We'll all be heading there.

”

“

GOV finally has released its guidance for restaurants, **hotels**, accommodation and leisure businesses **reopening** from 4 July. Keep in mind that health leaders warn **UK** must urgently prepare for a second wave after PM gives the hospitality the go-ahead.

”

“

It's brilliant to hear that UK **hotels** are reopening on the 4th of July. There are some fabulous parts of the #UK to visit. Whether you want beautiful scenery or a coastal beach break. We have our eye on Brighton, York & the Lake District! [#heatwave](#) [#WednesdayThoughts](#)

”

“

Summer pressures to deal with first please, now **hotels** are to **reopen** in a fortnight. The extent of any staycation surge will soon become clear in bookings. But even a normal high season swamps Devon's wards, as became very evident to me first-hand a couple of Augusts ago.

”

“

Slightly confused how hotels/b&bs/Holidays abroad are due to start in 2weeks but UK campsites won't open yet! People are less likely to come into contact at these: self contained campervans/motor homes/caravans Thinking face only the toilets ppl will have to social distance - makes no sense!

”

Transport

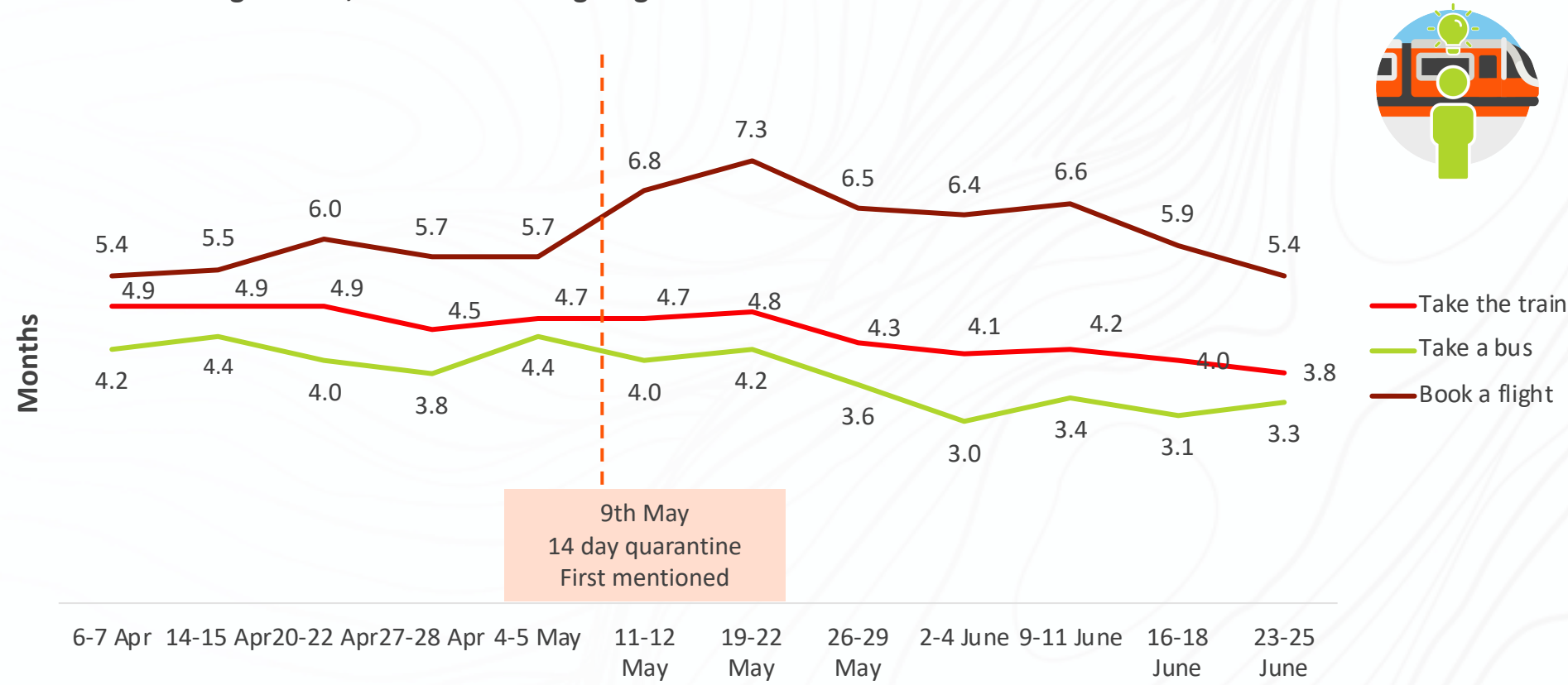


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For air travel, typical lead times continue to decline – but from a lengthy starting point. Rail services continue to record a gradual shortening of anticipated lead times, while for bus services the trend over the last month has largely been flat.

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



After two consecutive weeks of decrease, we see the proportion who would book a flight by the end of August increase to 12%

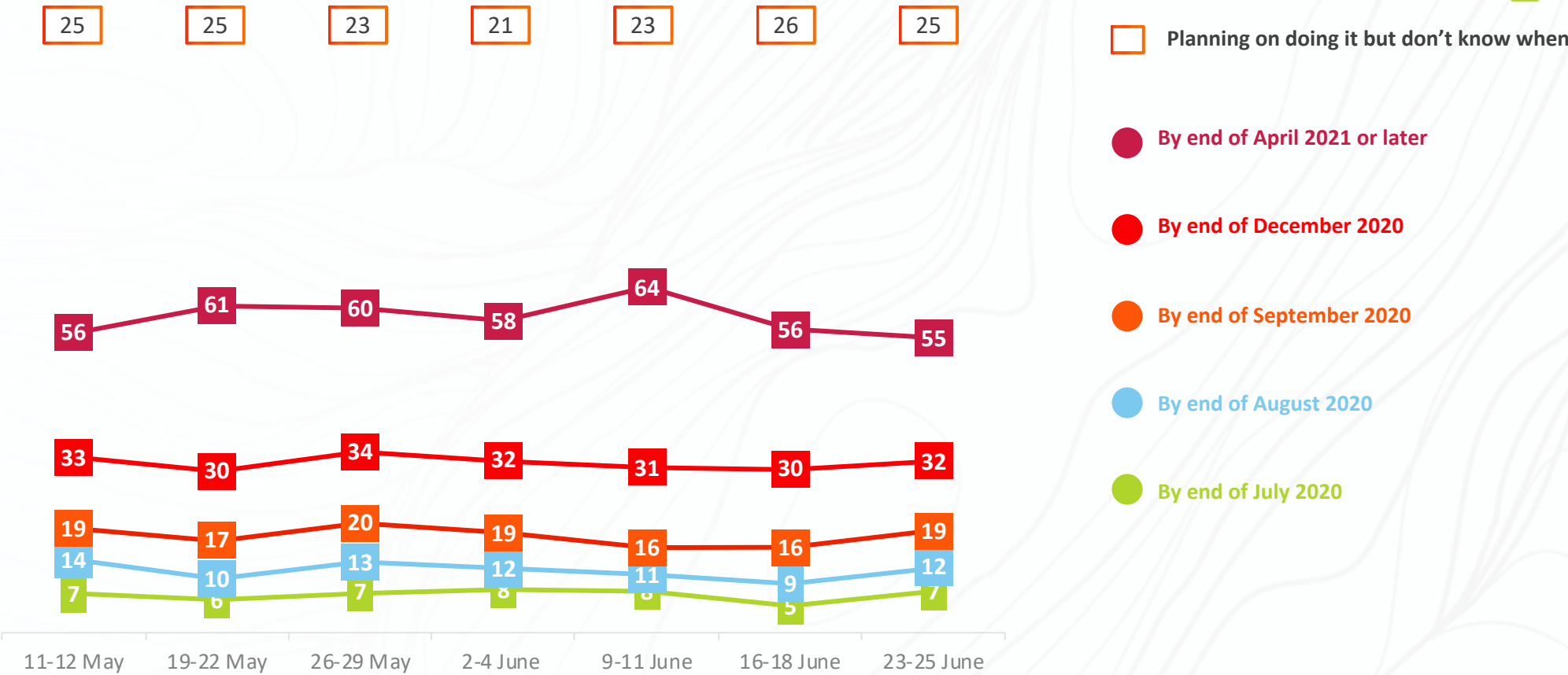


Book a flight

This week

5.4 months

Average time before the activity



On social media – As many countries re-open their borders and airlines re-start their services, people are starting to anticipate their next flight

“ @British_Airways Hi, Could you pls advise me when BA will resume flight services to China Mainland after months of suspension due to COVID19? ”

“ @FirstChoiceUK hi. When will you be releasing May 2021 to Barbados? Thanks ”

“ Dear Air India. Do you have any indication when normal international flights from ATQ to BHX will resume please? My inlaws were due to travel back to the UK in May but flights were cancelled. Can they travel on their original tickets? ”

“ @easyJet When do flights resume between UK and Germany ”

“ @VirginAtlantic
I am looking to fly from Manchester to the US in August to see girlfriend. Will this be possible? I am a **uk** passport holder ”

“ @Ryanair @EasyJet considering booking flights to Spain for July - if **UK's** / Spain's lockdown policy changes between now and when we go, what's your refund policy on this? ”

“ I get Qantas international flights are cancelled until mid October but are any other airlines allowed to come into Australia to take someone like me back to the UK . ”

“ @Ryanair Not long before Rhodos! Can't wait! ”

“ @LBIAirport and @Ryanair
I live 2 miles from the airport, can't wait to hear the planes again. Mind you 2 Jet2's landed today was nice to see them Smiling face with sunglasses ”

“ Once you open the border, allow airlines to fly in and out, the domestic operations will turn out even greater. It will be 4 MONTHS next month that I am away from my residence in UK and family. Take action and do the needful. We all have lives to live mate. ”

“ @Ryanair Can't wait for the Government to drop quarantine or open "air bridges" next month. Wish you'd have more flights from Cardiff though. ”

While overall intention to use rail services remains significantly lower than in the pre-COVID 19 period, intention to catch a train at some point in the next few months recovers this week



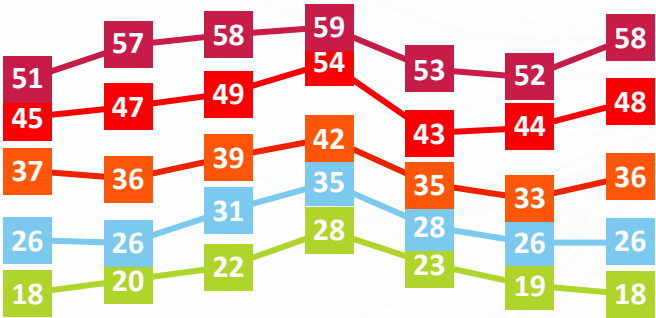
Take the bus



This week

3.3 months

Average time before the activity



11-12 May 19-22 May 26-29 May 2-4 June 9-11 June 16-18 June 23-25 June

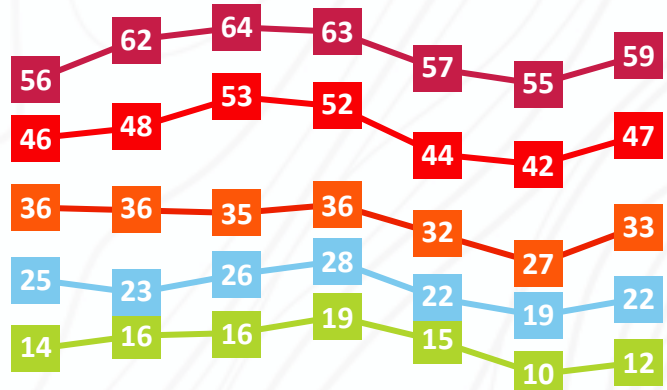
Take the train



This week

3.8 months

Average time before the activity



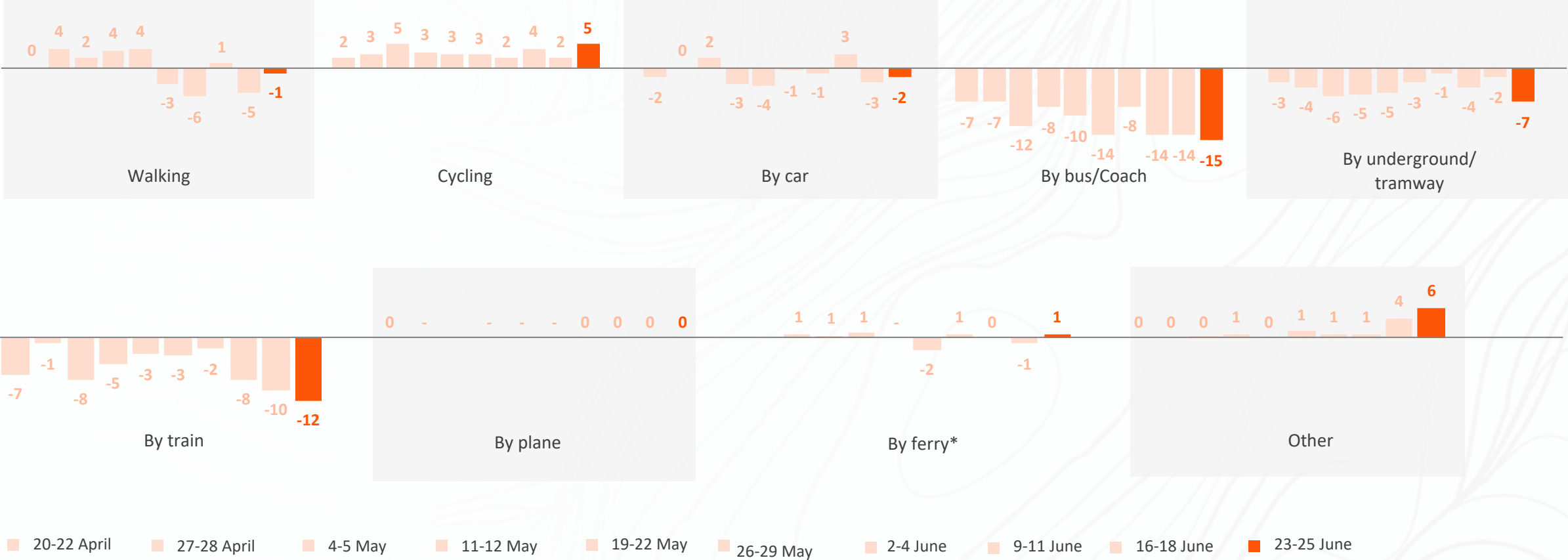
11-12 May 19-22 May 26-29 May 2-4 June 9-11 June 16-18 June 23-25 June

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

No doubt partly driven by government advice, most forms of public transport continue to record large declines in intended usage relative to the pre-COVID 19 period – indeed for rail services, the net decline grows for 3rd consecutive week.



Commuters - Post lockdown net change in expected usage (%) Base (n= 153)

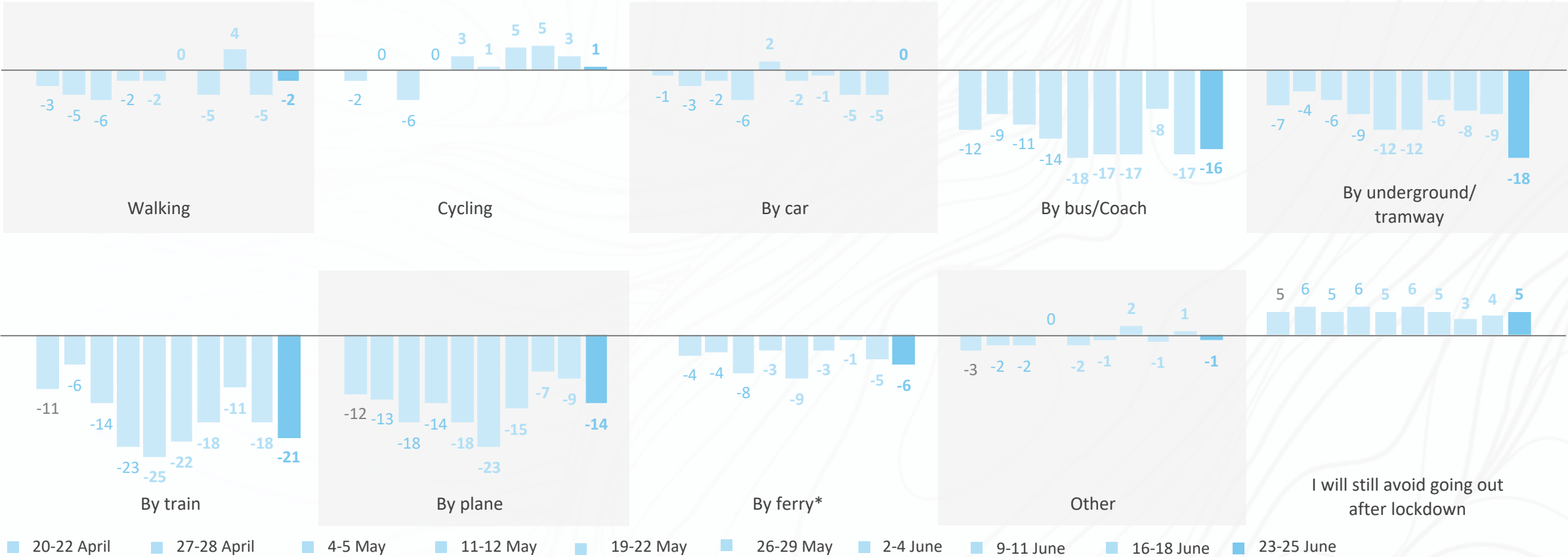


Q41: Before the coronavirus, how did you tend to travel...
 Q42: After lockdown has ended, how do you expect to travel ...
 * Added 27-28 April

With many consumers still seeking to minimise their travel, cycling continues to be the only form of transport to record a net increase in anticipated usage for leisure / business purposes.



Leisure/business - Post lockdown net change in expected usage (%) Base (n= 190)



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

Personal finances



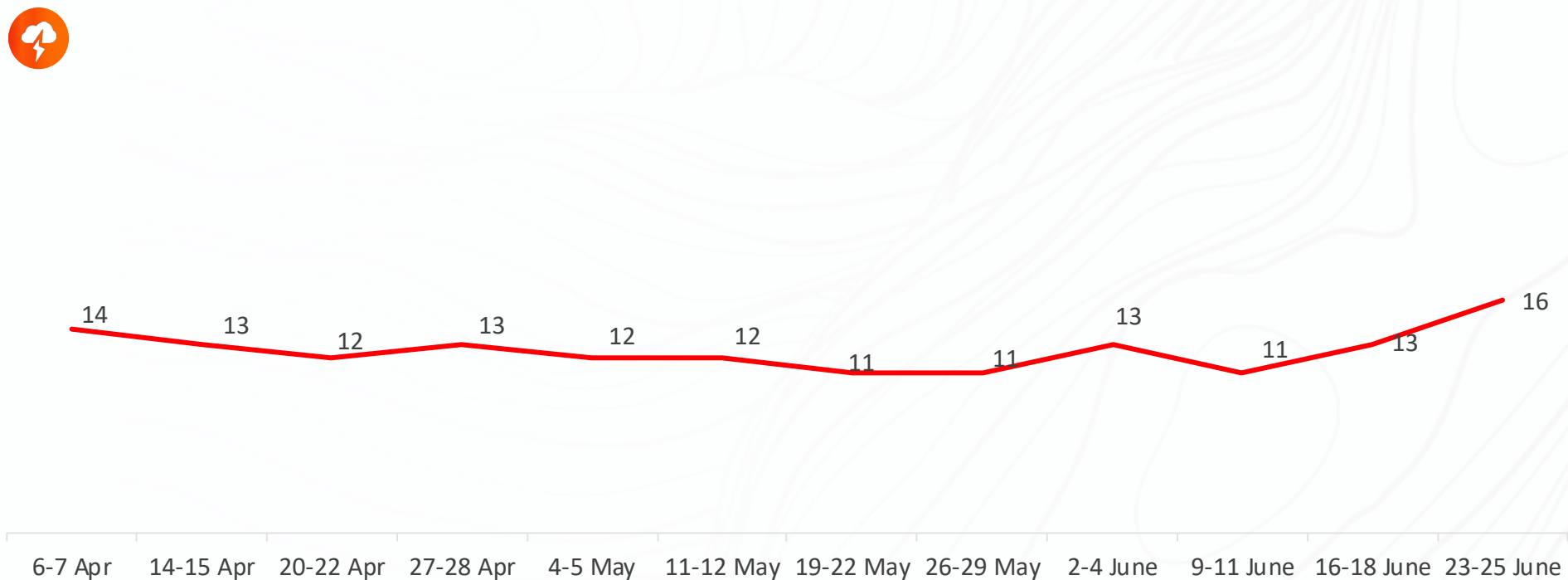
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This week we report a new high in the proportion of adults who are ‘struggling financially’. Families with children and those facing higher costs of living in London are among those most likely to be feeling the pinch.

Having previously looked at financial well-being, this week the spotlight turns to the 1 in 6 who are struggling due to limited income and nothing in the way of savings and investments

Percentage of consumers financially struggling (%)



Analysis across the combined responses for the last three weeks showed that struggling consumers (13% overall) were more likely to be found amongst:

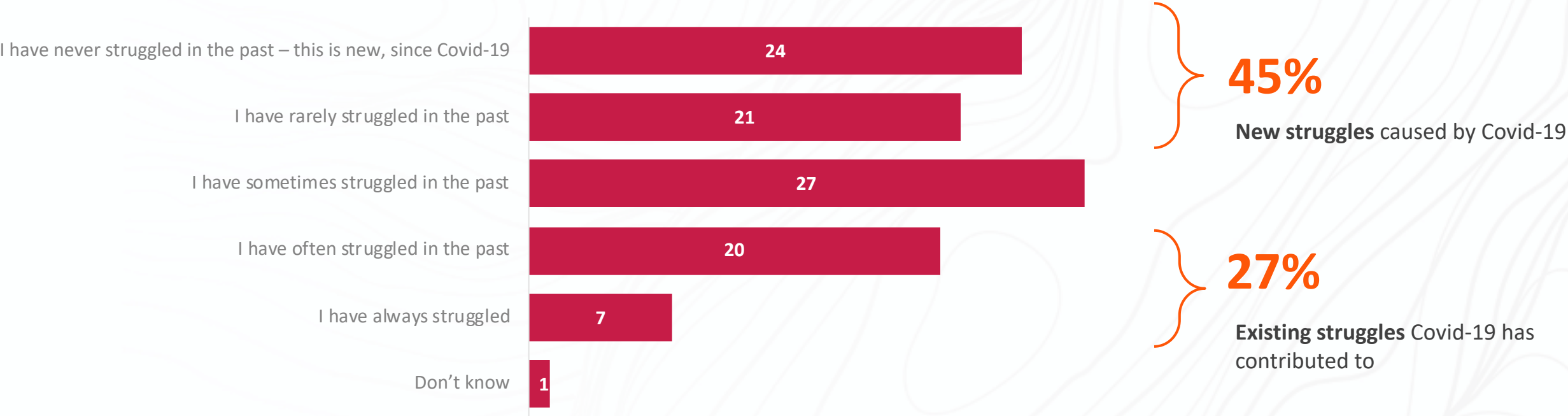
- Those in London (20%)
- Those aged 35-44 (19%) or 45-54 (18%)
- Families with children (19%)
- Women (16%) rather than men (11%)

Q30. Thinking about your overall financial situation, taking into account your household income, your total outgoings and any savings, investments or other assets you may have, which ONE of the following statements best describes your feelings about your own situation, right now? 'I'm struggling - My monthly income does not meet my needs and/or I have no savings or investments

Almost half of those currently struggling (and 6% of all consumers) say this financial struggle is a new or rare experience for them




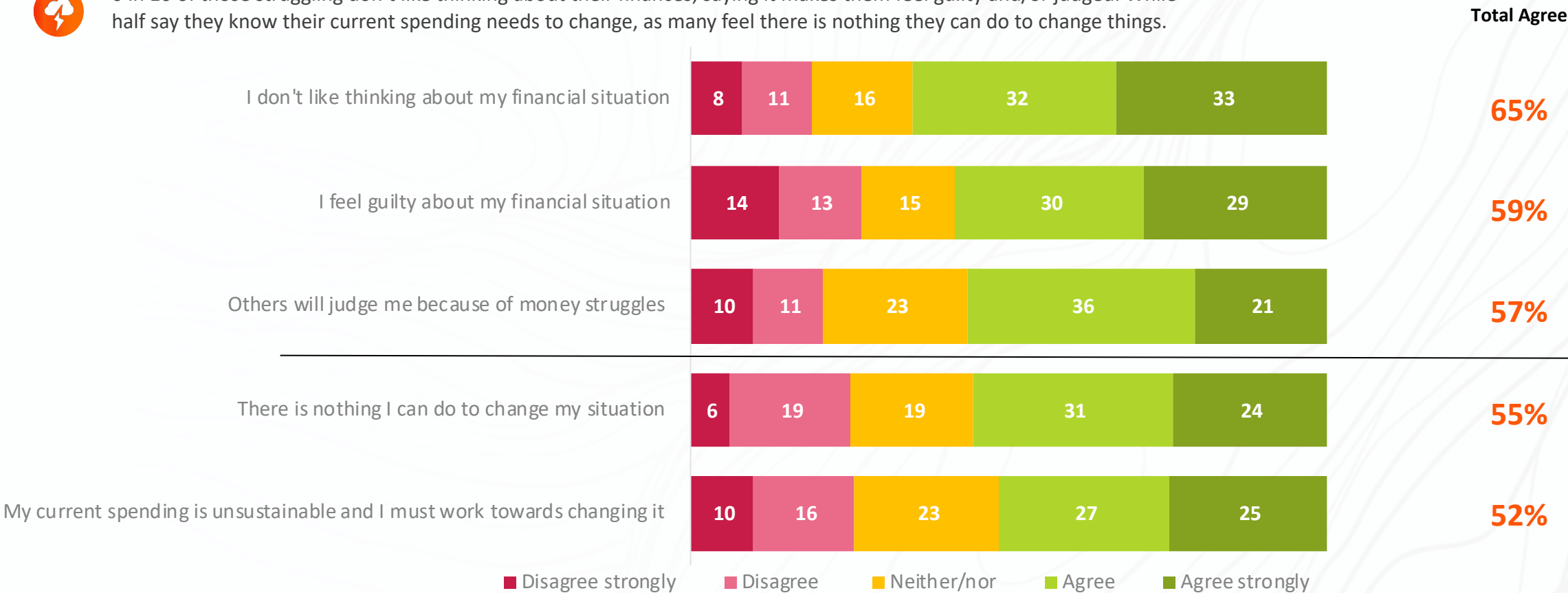
24% of those struggling financially say that this is a new experience for them, entirely due to Covid-19 and a further 21% have rarely struggled in the past. This 45% of those struggling for whom it is a new experience is the equivalent of 6% of all consumers



These financial struggles are more likely to be a new/rare experience for younger people (6 in 10 of those aged under 25 who are struggling said it is a new/rare experience, declining by age to 3 in 10 of those struggling aged over 65). Consumers in London were both more likely to be struggling and also more likely to say it was a new/rare experience (6 in 10)

6 in 10 struggle emotionally with their financial situation and feel judged, but almost as many feel helpless

 6 in 10 of those struggling don't like thinking about their finances, saying it makes them feel guilty and/or judged. While half say they know their current spending needs to change, as many feel there is nothing they can do to change things.



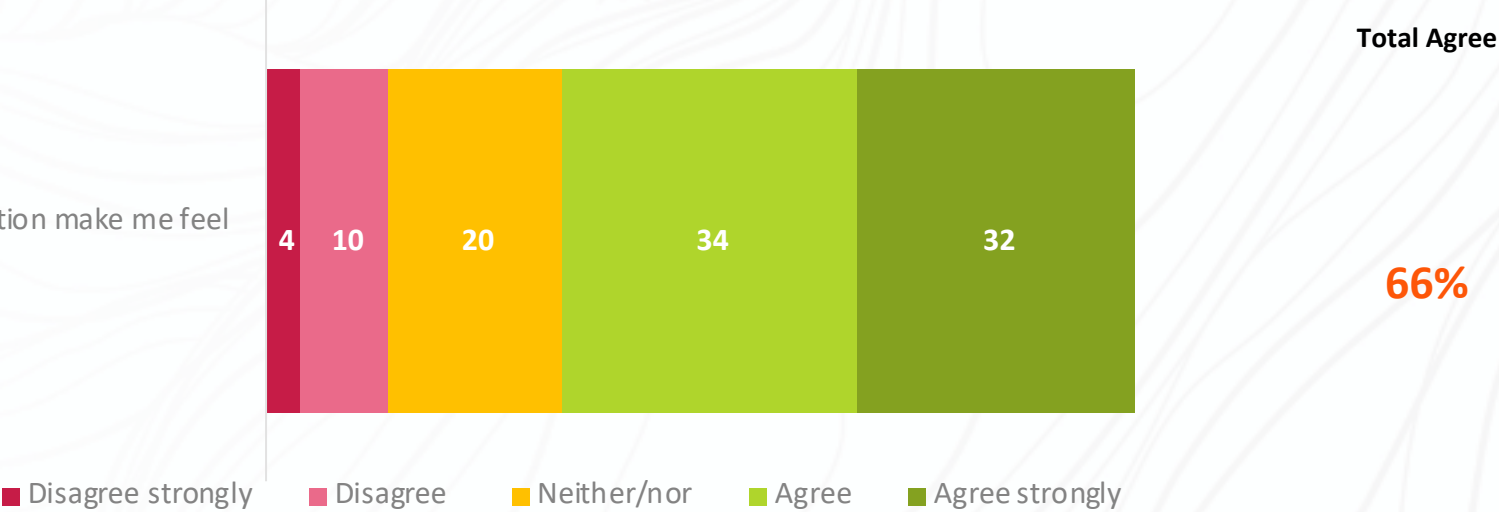
Women are more likely than men to avoid thinking about their finances (70% v 56%) and to feel guilty about them (65% v 51%), but both genders are equally likely to feel judged and that there is nothing they can do to change the situation. Younger people are also more likely than older ones to feel judged and to avoid thinking about their finances

For two thirds of those struggling, receiving letters from providers about their finances makes them feel worse



With the majority of those struggling already worried and feeling guilty about their finances, two thirds agreed that getting letters from a financial provider makes them more worried – and this impact was seen across both men and women and older and younger consumers. The challenge for financial providers is how to better communicate important and often legally required information in an emotionally charged situation

Letters from financial providers about my financial situation make me feel more worried



On social media – Many express feelings of worry and stress that arise when communicating with financial providers about their financial situations. In particular, letters from debt collectors and banks appear to be causing distress.

“ @Arval_UK Customer experience is dreadful. Receiving debt letters when I have contacted you on a couple of occasions. Raised a complaint and received no feedback other than the letter today. Don't use Arval! Dont care about you!

”

“ After appealing the case with evidence of fraud they have told me they will refund the amount. This was 3 weeks ago. I have since been harassed by a debt collection company with emails, letters and phone calls on @PayPal behalf.

”

“ @santanderukhelp Hello I had taken holiday payment for my personal loan and I received a letter today saying my payments are in arrears I don't understand

”

“ @HSBC_UK @TheFCA how can HSBC send me a letter saying I owe them money and when I call they can't find me on their systems? Yet another hour spent on the phone trying to sort out. Still not sorted!!!

”

“ @HSBC_UK Tried to call and it will not connect. Just received a letter saying my loan is in arrears, but you had already confirmed to defer my payments for 3 months due to Coronavirus. What's going on?

”

“ @avangroenendael @Arval_UK @MartinSLewis @TheFCA Dismal how Arval are treating customers during the pandemic. Cancelled my car lease with them months ago though received default letter and now further letter saying matter will go to debt agency even though contacted them and made official complaint. Waiting for reply on complaint. health issues which make this situation extremely stressful.

”

“ @TheFCA @HSBC_UK will my agreed loan holiday affect my credit rating? My score seems to have changed recently and I have had a letter stating i am in arrears. Not impressed with a threatening letter in the post to be fair.

”

“ @santanderuk why waste money and kill trees with rubbish unnecessary letters like this? I renegotiated my new mortgage deal with you nearly a month ago...#leftarmmeetrightarm

”

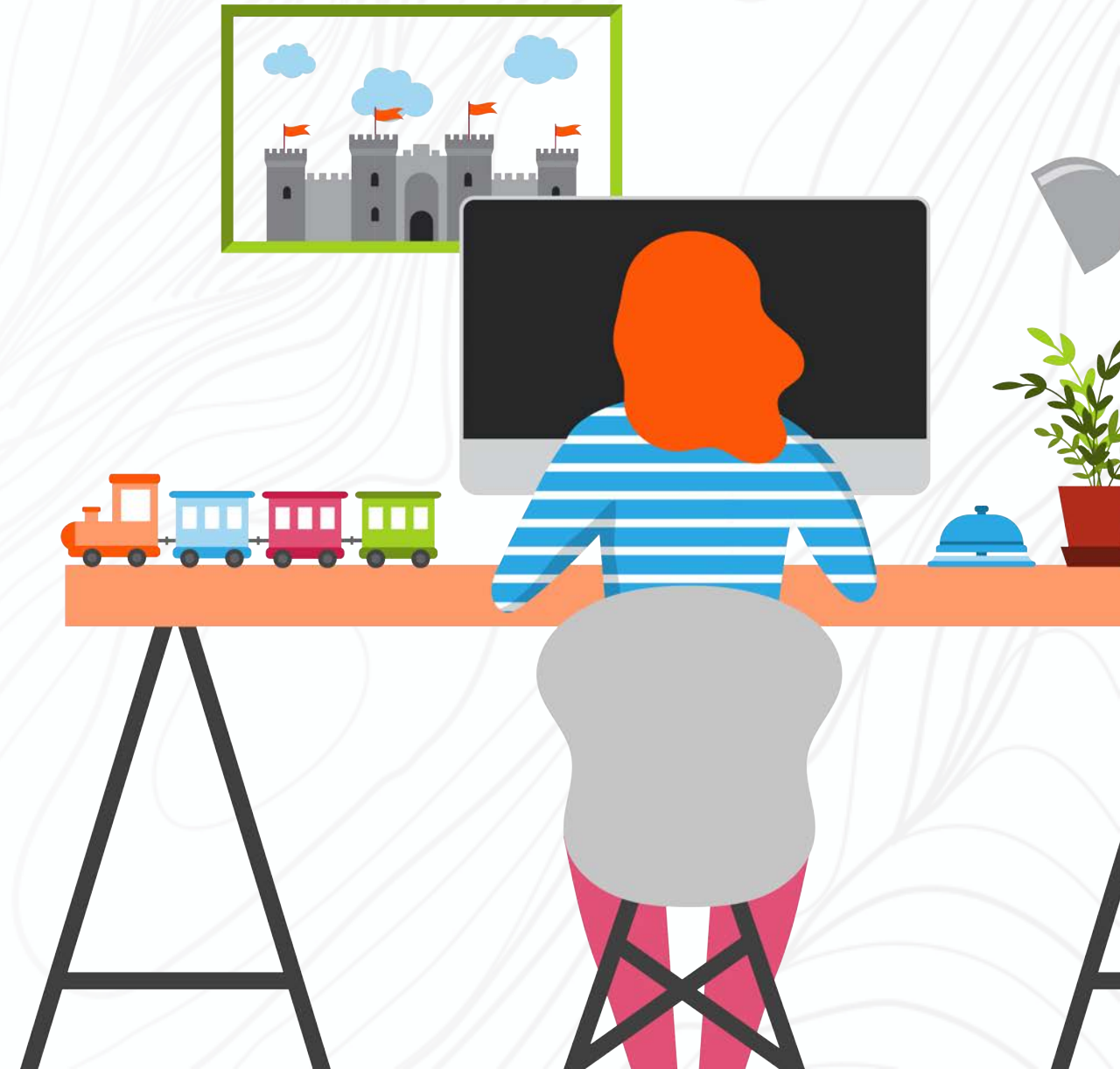
“ Shocking #customerservice from @bt_uk they couldn't collect my final bill payment so instead of contacting me, let time run out and handed me straight to debt collectors when the final bill letter states I DONT HAVE TO DO ANYTHING AS PAYMENT WILL BE TAKEN BY DD AS USUAL!

”

Appendix



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Methodology

Survey of Consumers

Nationally representative online survey, conducted weekly. This week we surveyed 1,756 British adults.

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

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

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

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



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



= 'All UK Adults' (nationally-representative)

Social media analytics

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

Our social analytics capability gets closer to the conversations happening in the online space, by listening to how brands are talked about across social media and how brands' reactions to the situation is viewed online.

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

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

- 22,147 posts for the transport sector
- 11,209 posts from the leisure sector
- 9,523 posts from the hospitality sector
- 2,260 posts from the financial sector

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