

Tribe

Turbulence ahead.

How online media coverage is shaping consumer perceptions of the airline industry as the COVID-19 crisis develops.



Fasten your seat belts for a communication challenge.

The global Coronavirus crisis has impacted severely on consumer experience of airlines. How people judge the airlines' behaviour during this time will inevitably shape future decisions about brand choice. Understanding evolving consumer perceptions is as important as financial security, if airlines are to retain the loyalty and trust of customers, suppliers and staff through the difficult weeks and months ahead.

With the UK confined indoors, online media coverage will be the determining factor in the reputation of individual airlines. The themes and issues covered in online publications are shaping perceptions on a day-by-day basis as the state of emergency unfolds.

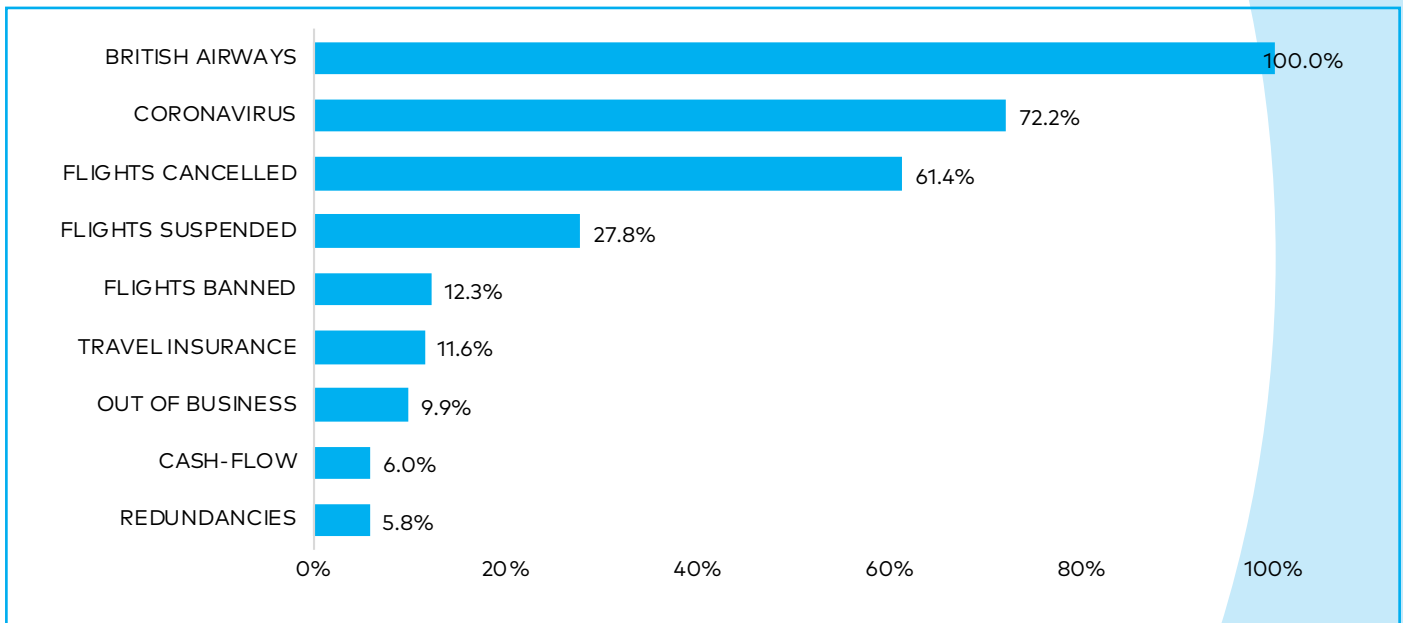
Tribe's industry sector analysis gives airlines weekly updates on what consumers are taking out of online media coverage. It also shows how they are reacting to what they read about airlines in online news.

Invaluable for informing data-driven corporate communications and consumer PR as airlines battle to stay viable, these reports will help CEO's, CFOs, CMOs and PR teams determine the scale and focus of the communications task ahead. The smartest brands in the world know that proactive communication through a crisis is essential to long-term brand health. However, smart communication depends on smart data.

This report provides a selection of the data that is available for all airlines and airports worldwide. Bespoke analysis and insight is also available. Please call us to discuss how our team can help you understand:

- The opinions and behaviour of your most important asset – your customers – in a time of crisis
- The powerful role played by online media in making or breaking reputation.
- How you are currently positioned in the minds of consumers compared to competitors.
- What you might do to emerge from the COVID-19 crisis in a better position to ramp up marketing and retain customers.

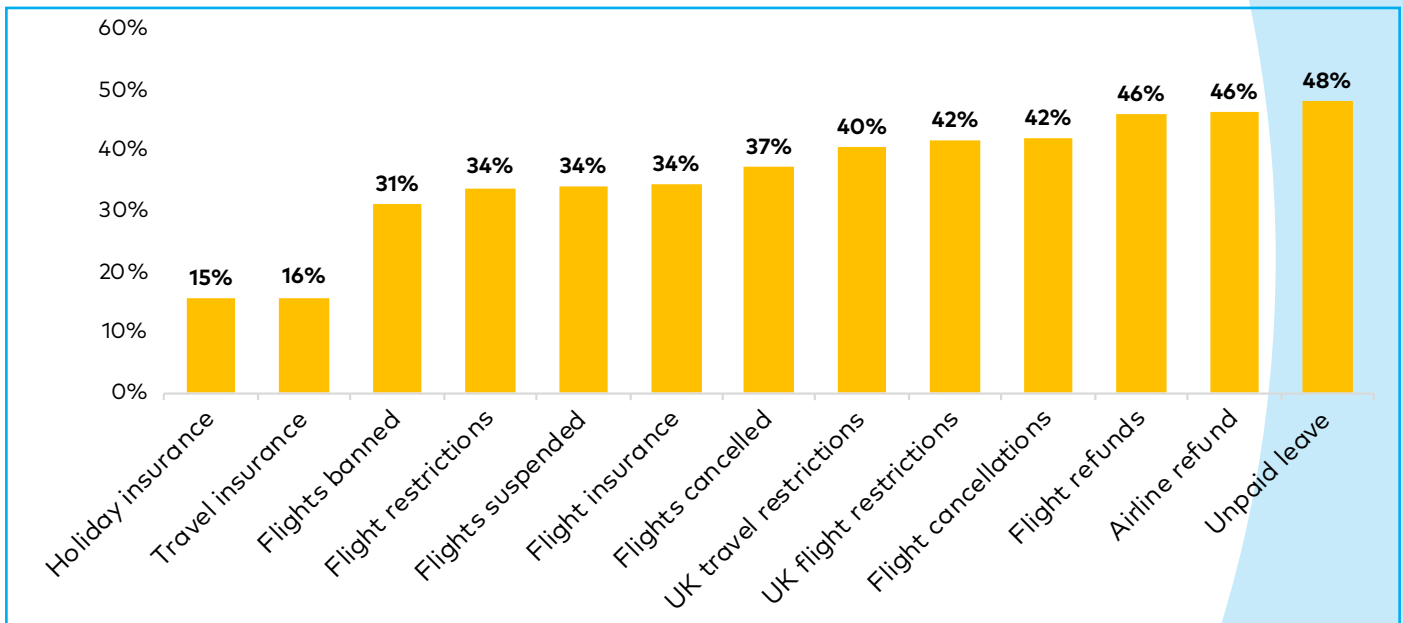
Key topics in media coverage about British Airways and coronavirus: 1 Feb to 17 Mar, 2020.



Proportion of Engaged Audience
Base: UK PRSV coverage for airlines between 1 February and 17 March, 2020

- This chart shows that 72% of the Engaged Audience who saw, read and reacted to online media coverage about British Airways between 1 February and 17 March 2020 were reading about the airline and coronavirus.
- Already, the Engaged Audience was being exposed to messages about cash-flow issues, potential redundancies and the possibility that British Airways might go out of business. This impacts on confidence.
- In the early days of the crisis, most messages were about flight cancellations or suspensions. However, with most planes now back at base, the media won't stop its focus on the fate of the airline industry, or individual companies.
- Tribe allows airlines to discover which key themes are shaping stakeholder perceptions at any given time, allowing them to respond proactively with communication to passengers concerned about the future of business and leisure travel, as well as other stakeholders such as government and banks.

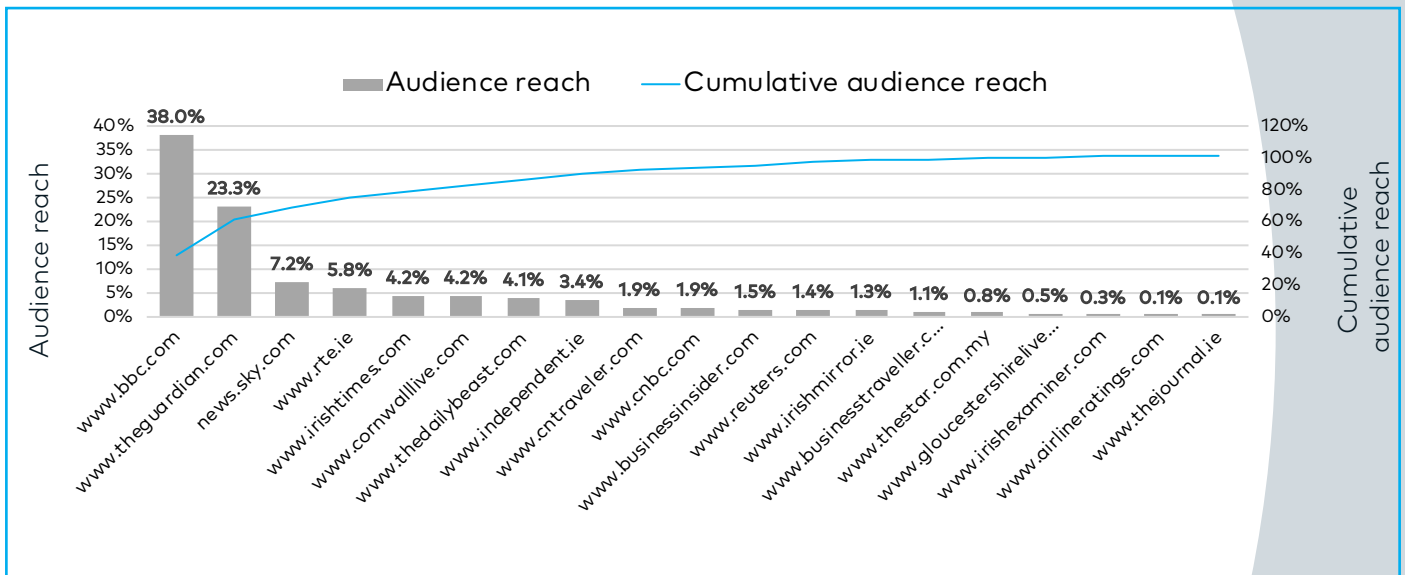
Overall impact of online media coverage on Google search terms shown: Virgin Atlantic and coronavirus.



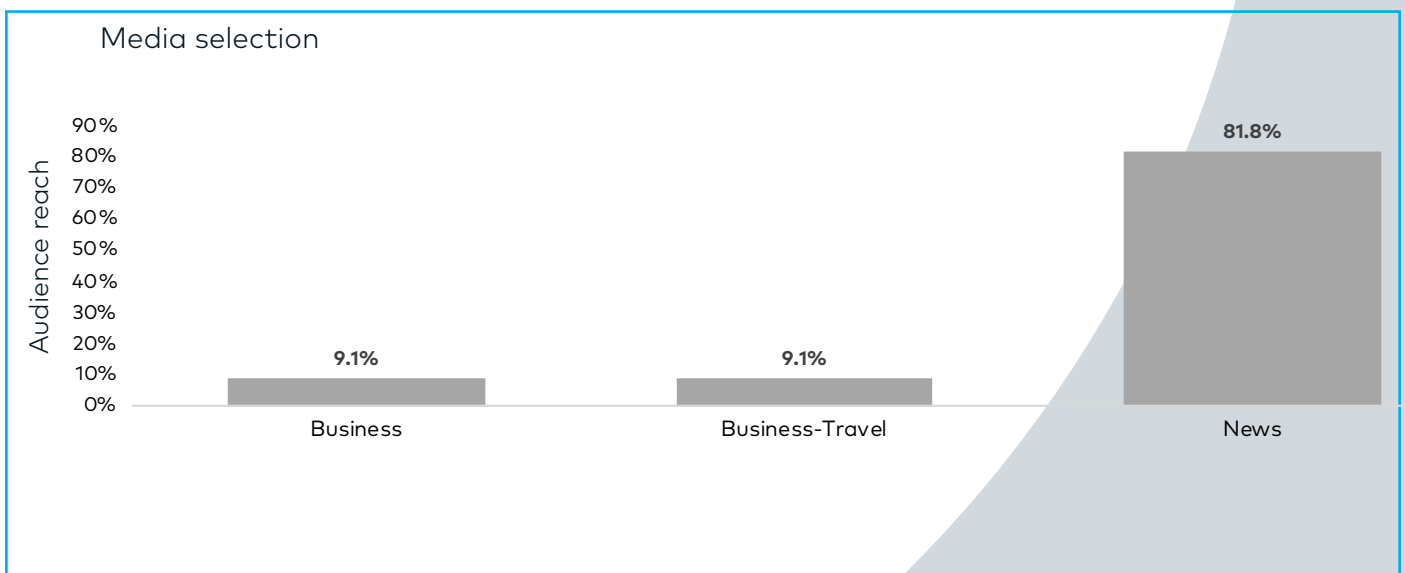
Base: UK PRSV coverage for airlines between 1 February and 17 March, 2020

- The impact of online media coverage on corporate reputation is very clear in the case of Virgin Atlantic.
- Online media coverage about the airline forcing staff to take 8 weeks' unpaid leave has resulted in high volumes of Google search for that topic in relation to the Virgin brand.
- In fact, unpaid leave was the most searched-for topic relating to Virgin Atlantic and Coronavirus, even more so than the other topics affecting all airlines
- Tribe insight can be combined with bespoke consultancy from our communications team. This includes emotional analysis of unstructured data from other sources, such as Twitter, which pinpoints why consumers are thinking and responding as they do. It can also be combined with Audience Closeness to obtain direct-from-consumer feedback to help senior leaders understand customer opinion in the moment. This is delivered via video diaries, online communities, online surveys and in-depth telephone interviews.

Media in which coverage has appeared: Aer Lingus and coronavirus.



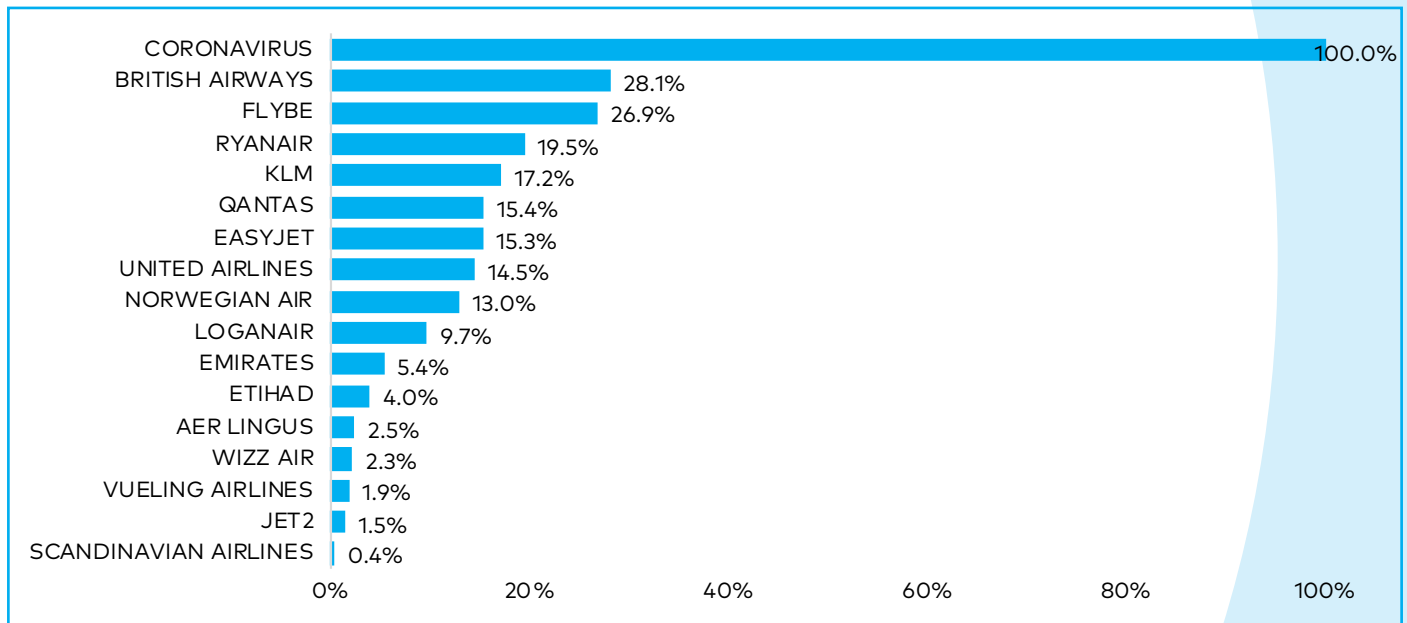
Base: UK PRSV coverage for airlines between 1 February and 17 March, 2020



For any communication team, knowing which online media are having the biggest impact on your Engaged Audience feeds into planning and execution of programmes that are likely to be more influential. These media are not always those you might expect.

- Despite RTE being the national broadcaster in Ireland, bbc.com has delivered the highest proportion of Engaged audience for Aer Lingus during the COVID-19 crisis to date.
- When analysing media effectiveness, the 80/20 rule almost always applies, with 80% of audience impact being delivered by a very small group of online media channels. The rest, in the 'long tail' are not unimportant from a PR perspective, as long as brands realise their relative audience impact is much lower.
- When it comes to analysing which section of online publications have driven the highest audience engagement for Aer Lingus, it is the News section that is reaching a far bigger Engaged Audience than either Business or Travel at this moment.

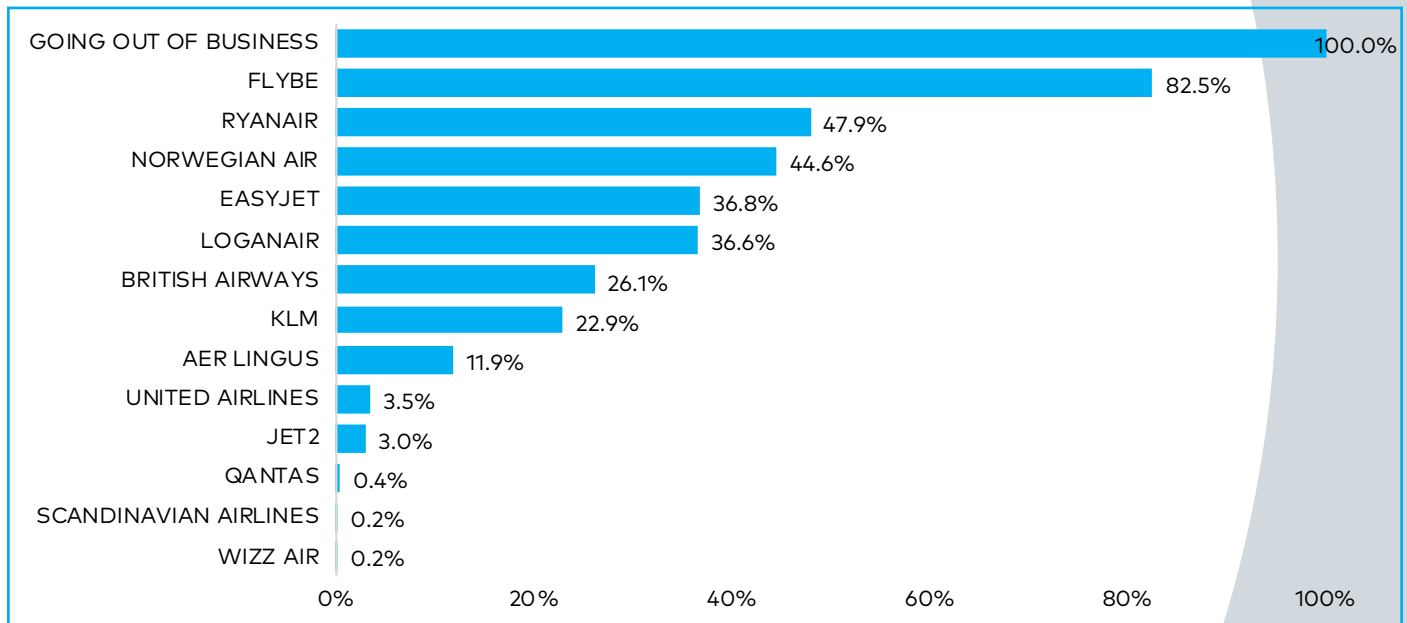
Exposure of brands in media coverage about airlines and coronavirus : 1 Feb to 17 Mar, 2020.



Proportion of engaged audience
Base: UK PRSV coverage for airlines between 1 February and 17 March, 2020

- This chart shows which airline brands have received most exposure with the Engaged Audience reading about Coronavirus in online media content since 1 February.
- The plight of British Airways and the demise of Flybe were the most-consumed stories, while content about Jet2 turning flights round in mid-air, for example, was read by a much smaller size of Engaged Audience.
- Where a brand is in the news, it always helps to understand the context. What may seem high-profile to the in-house team might not actually be as influential as they believe, either in a positive or detrimental sense. Tribe allows the impact of news stories on the Engaged Audience to be assessed quantitatively in relation to what's happening across the industry.

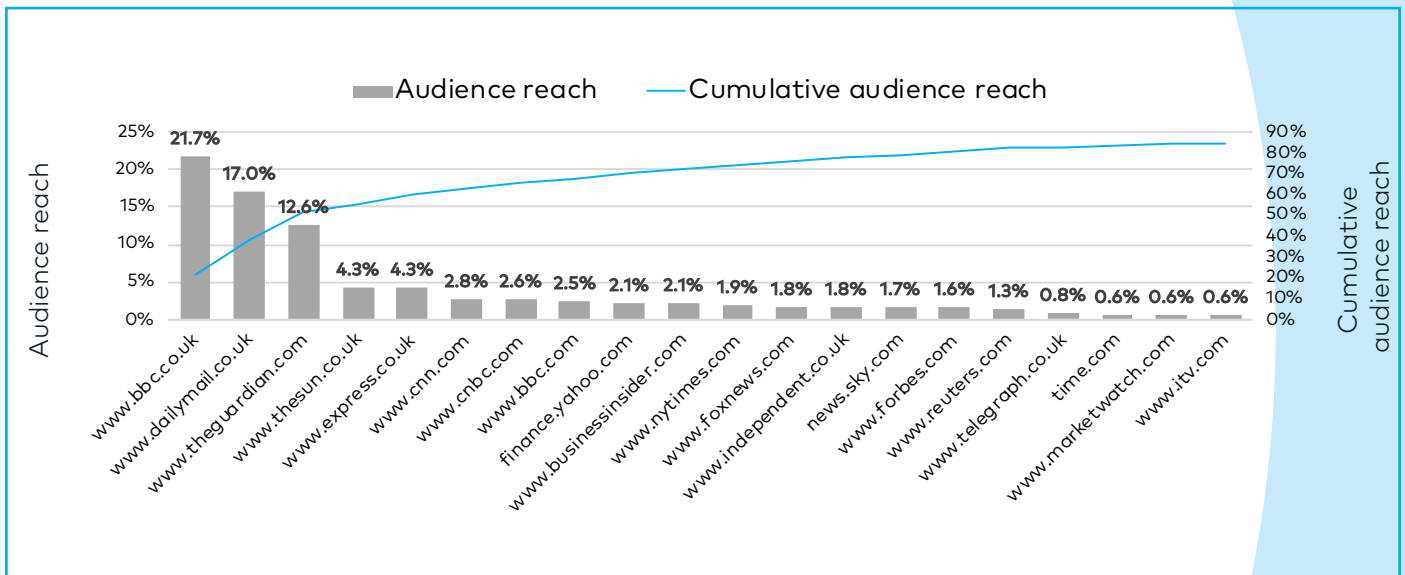
Exposure of brands in media coverage about airlines going out of business as a result of coronavirus: 1 Feb to 17 Mar, 2020.



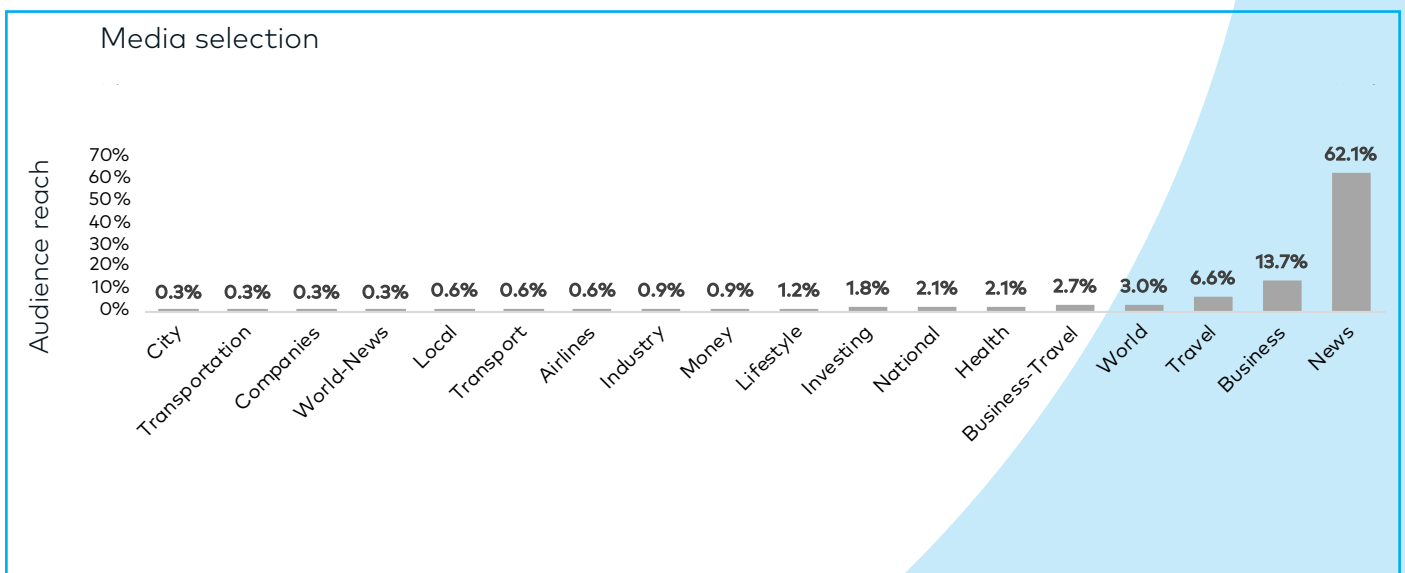
Proportion of engaged audience
Base: UK PRSV coverage for airlines between 1 February and 17 March, 2020

- Flybe has actually gone into administration, so it is hardly surprising that this is the airline most people read about in association with 'going out of business'.
- However, other airlines should be aware of the extent to which online media messages about 'going out of business' are also reaching their customers, shareholders and employees. At this time of general fear, uncertainty and doubt, no airline wants the Engaged Audience to be having doubts about its viability.
- Ryanair, in particular, should be concerned about the level of content which is influencing the Engaged Audience's view of its ability to keep flying.

Media in which coverage has appeared: Coronavirus and airlines.



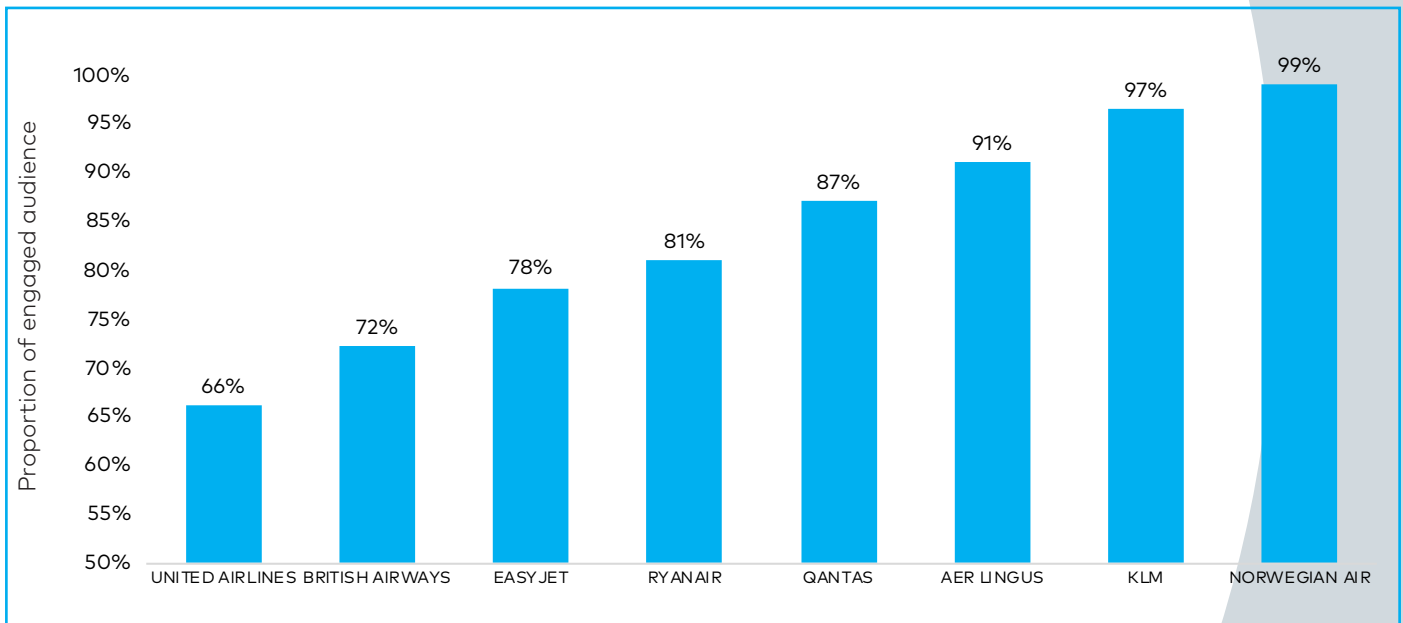
Base: UK PRSV coverage for airlines between 1 February and 17 March, 2020



Which online media have been most influential overall in shaping the perceptions of consumers and other stakeholders about airlines and Coronavirus?

- Clearly, bbc.co.uk has been the go-to source for the nation, followed by dailymail.co.uk and guardian.com.
- Other online versions of national newspapers have been significantly less helpful in reaching large volumes of Engaged Audience.
- The analysis also demonstrates the global nature of news consumption, with several international news channels influencing the opinions of the UK Engaged Audience.

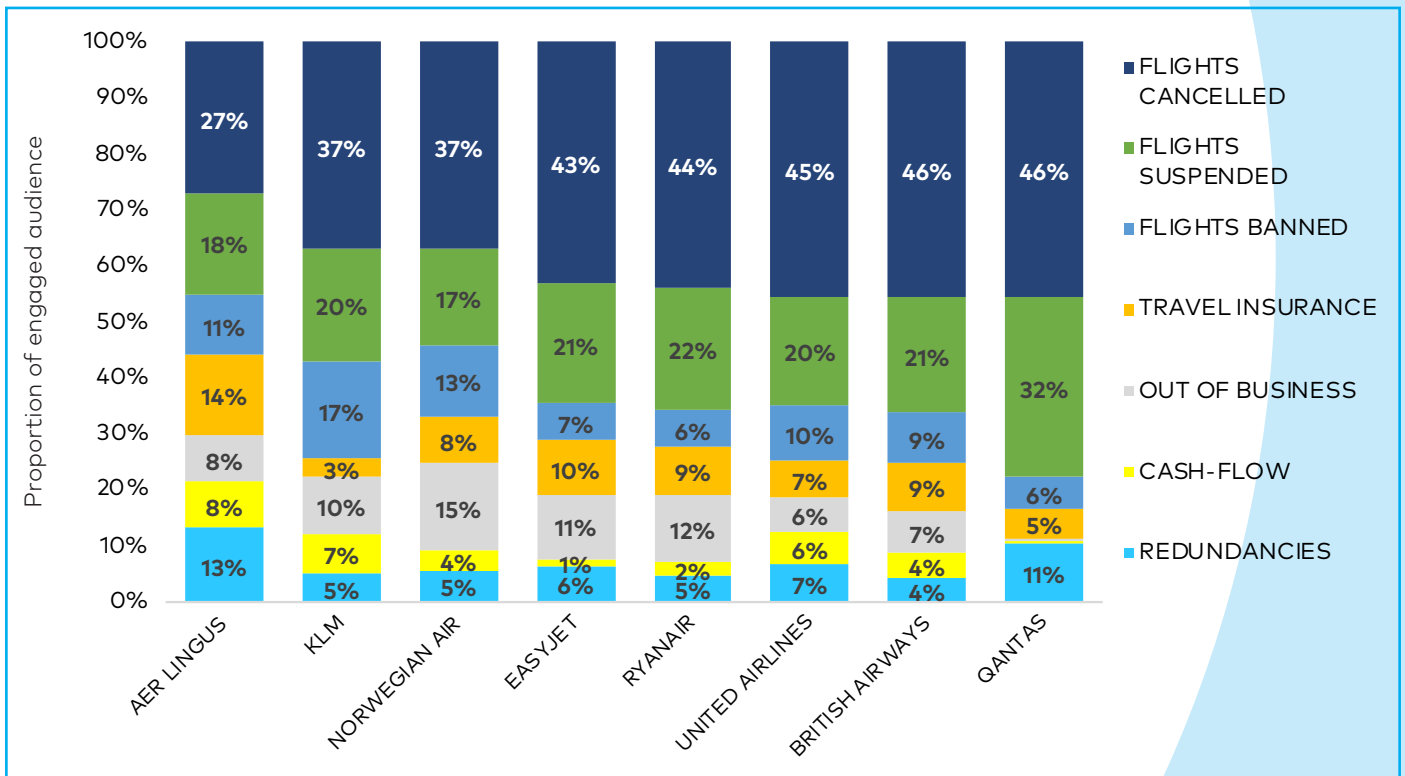
Impact of coronavirus on media coverage for airlines as a proportion of audience reach for each airline brand: 1 Feb to 17 Mar, 2020.



Base: UK PRSV coverage for airlines between 1 February and 17 March, 2020

- Coronavirus dominates what audiences are taking out of online media coverage more for some airlines than for others.
- For Norwegian Air, 99% of the total engaged audience reached between 1 February and 17 Mar was reading about the airline in association with Coronavirus.
- For United Airlines, only 66% of its total engaged audience from online media coverage was reading about the airline in association with Coronavirus, with other stories still getting the attention of the audience too.

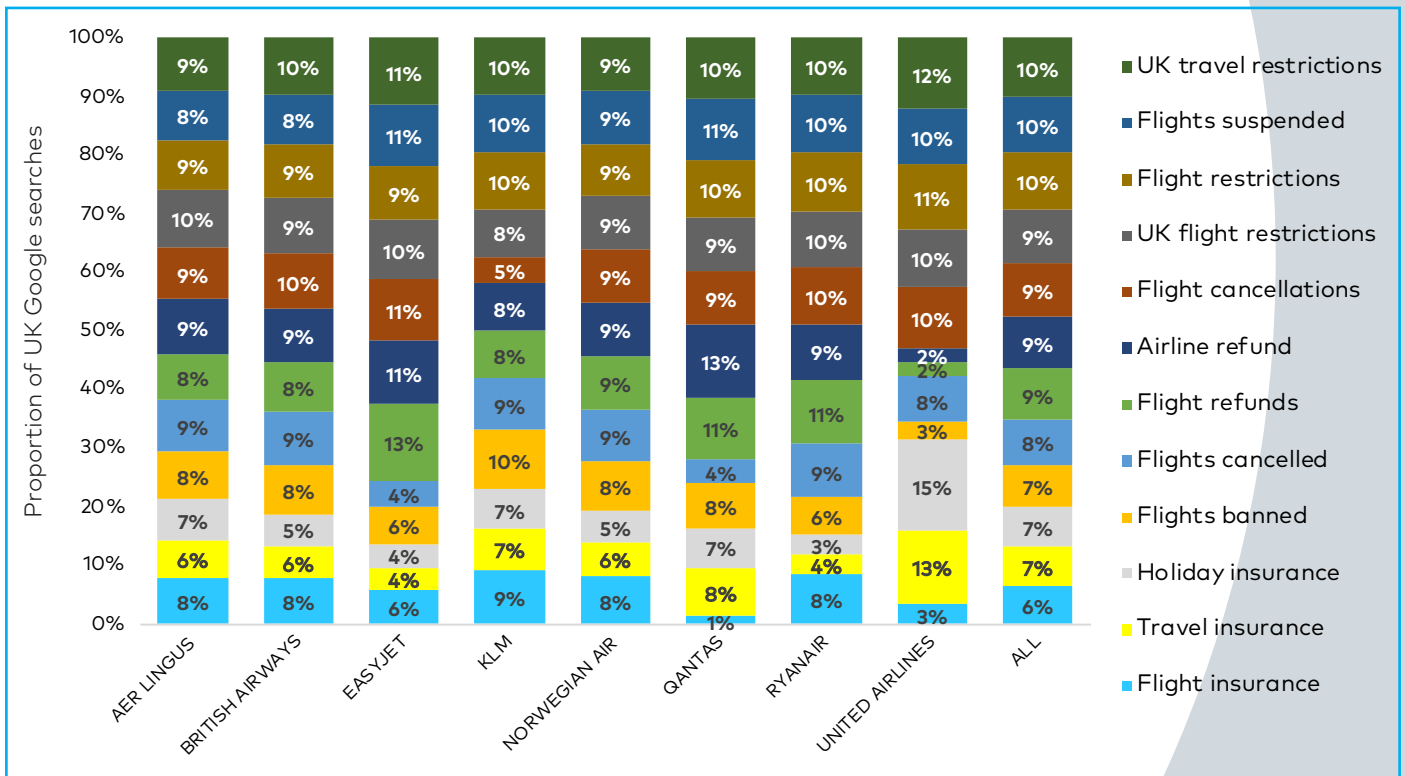
Proportion of audience reached by media coverage on key topics, by airline brand: 1 Feb to 17 Mar, 2020.



Base: UK PRSV coverage for airlines between 1 February and 17 March, 2020

- For each airline, we can also see the split of topics related to Coronavirus that have reached the Engaged Audience.
- The subject of redundancies has had a larger impact on the audience for Aer Lingus and Qantas.
- Qantas also has the largest audience for messages around suspended flights, while KLM has been most impacted by media content about banned flights
- Norwegian Air 'going out of business' is a message that has been seen by 15% of its Engaged Audience.

Audience searches in the UK driven by online media coverage of coronavirus and airline brands: 1 Feb to 17 Mar, 2020.



Base: UK PRSV coverage for airlines between 1 February and 17 March, 2020

Audience response to online media coverage through Google search has also varied from one airline to another.

- A higher percentage of the Engaged Audience for United Airlines did a Google search for holiday insurance after reading online media content than they did for any other airline.
- A higher percentage of the Engaged Audience for easyJet did a Google search for flight refunds after reading online media content than they did for any other airline. United Airlines' media content produced significantly less Google search than competitors in respect of flight refunds.

About Tribe

"Tribe provides media intelligence and audience insights into the stories that are being read about your brand, and the conversations that are happening around them."

- We're an insight & communications consultancy that helps clients and their agencies to drive growth by maximising the impact of their PR & marketing activities, through:
 - Big data analysis & evaluation of online media, campaign activity and audience search behaviour.
 - Emotional & semantic analysis & evaluation of social media and online review content.
 - Qualitative consumer research & insight, immersion programmes & employee engagement.
 - Design & delivery of insight-led and data-driven PR & marketing communications campaigns.
- We can help you move beyond meaningless vanity metrics and focus on what really generates audience response.
- We use big data techniques, statistical modelling including regression analysis, sophisticated text mining and language framing to generate our results. Our data can be correlated with a clients' own to validate results and prove attribution.
- Our team of directors has a combined experience of 100 years' in PR, marketing and research – providing the human expertise around recognising insights and identifying opportunities.
- Our technical director Mark Westaby is a pioneer of the UK media evaluation industry, having founded Metrica, which grew to be the world's largest independent media evaluation agency and was bought by Gorkana/Cision; as well as being a founding member of AMEC.
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