Tracking Consumer Sentiment on the Impact of COVID-19

Travel & Mobility, Leisure & Hospitality,

Personal finance

Weekly Update – 15th July 2020

Introduction

The Summer Statement delivered by the Chancellor Rishi Sunak on 8th July is the latest major intervention by the British government in response to the coronavirus crisis. What in effect is a mini-budget has been hailed by many across tourism, leisure and hospitality, as much for the recognition the sector is now being accorded by government as for the detail of the support being offered.

From a consumer perspective the 'eat out to help out' August mid-week discounted meal offer is the one that grabbed the headlines, although for hotels, restaurants and attractions the 6 month VAT reduction will have more financial consequence.

There can be little doubt the discounted meal offer has been informed by the principles of behavioural science. As our covid risk perception segmentation demonstrates, for large parts of the population there is a torpor about re-engaging with what once were regular, everyday activities. The 'meal deal' offer is an attempt to jump-start one part of the experience economy and so nudge us back to our habitual behavior, habits that have been broken by the lockdown.

The government sponsored marketing campaign to 'Enjoy Summer Safely' is another move to counter the months of being told to stay at home and minimize contact with others. After the higher than anticipated levels of compliance with the regulations during the period of restriction there is a real challenge if consumers are to 'unlearn' the behavior that was drummed into them.

In spite of the easing of the lockdown in various steps over recent weeks the national mood seems little changed. This suggests what have become apparently ingrained mind sets are determining the overall national mood, rather than any short term response to events. This makes an understanding of our Covid-19 'confidence' segments all the more important.

With around half of all British adults in one of three 'cautious' segments we may need a series of offers to entice some of the public back. One thing we do know from the results this week is that Britain is a nation of shoppers, so maybe it is time to apply the skills of retail (largely behavioural science again) in terms of bundling offers, promotions, BOGOFs, discounting etc, to the tourism, leisure and hospitality sector – at the very least give the appearance you are sharing with the consumer some of the VAT reduction, even if it is just hypothecating how you will spend it in a way that means they will see a benefit.

We are delighted to say that Matt Costin, our regular columnist, is doing his bit by having a family holiday renting a cottage in the South Hams district of Devon this week!

Stay tuned and stay safe!

Dr Crispian Tarrant
Chief Executive, BVA BDRC

Suzy Hassan
Managing Director, Alligator Digital

Executive Summary

Little changed national mood increasingly seems to be determined by ingrained attitudes rather than to be responding to events

Now that we can go to the pub, stay in a holiday cottage or get our hair cut, for the nation as a whole our underlying mood barely seems to change from week to week.

The proportion fearing the worst is yet to come is at its highest since what we know to have been the peak of the virus in mid-April. It would seem that continued worries about coronavirus are playing on our minds. The challenge for us all will be how to manage future covid-19 outbreaks with local, even micro-level lockdowns and effective test and trace.

Our segmentation of attitudes to coronavirus risk is shown to be very stable in this the second week of it featuring in our report

Once again 1 in 3 British adults are in the *'Life Goes On'* category. For them the risks from covid-19 are no more than the other risks that may impact them. Indexing strongly amongst the younger age groups they just want to get on with their lives. A further 1 in 5 are the *'Pragmatic Policy Supporters'* who acknowledge the virus risks but support the government moves to get the economy going. The three further segments (an unchanged 47% of the population), are anxious, impacted or just cautious, and for all of them there is a concern that we are re-opening too fast.

'Permission to visit' is entrenching the divide in opinion

Confirming we are a nation divided, it seems now we have permission to do some things that have been verboten for months, for every person who is keen to participate there is another who has become more circumspect as to when they will re-engage.

This is true across categories in the tourism, leisure and hospitality sector: on the one hand we are seeing a welcome increase in the numbers saying they will participate by the end of August and as a result average lead times are coming down. But on the other hand for many activities more also now say they want to do the activity but are non-committal as to when, so are excluded from the lead time averages.

We are a nation of shoppers

As we monitor the rate of recovery in different parts of the experience economy, going on a shopping trip / to a shopping mall is the top activity for its recovery. Amongst our travel activists 18% have already done this since retail was opened generally and a further 35%, a new high, intend to do so before the end of July. The classic non-essential shopping motivations of personal reward and indulgence are surely ones the tourism, leisure and hospitality sector can emulate?

A challenge to make hospitality more than a one-off experience

6% of our activists have been to a restaurant since the lockdown was eased, with a sizeable uptick recorded this wave. But a concern is that intent to do so (again) by the end of August has fallen for a second week – it would seem a single visit does not over-turn the staying at home habit so the 'eat out to help out' scheme may prove very timely.

The hotel industry will be encouraged by the recovery in the intention to book, to a new high by the end of August, even if the shortfall to normal occupancy remains large. Generally social media comment about how hotels are handling the situation is positive and this may build a feel good factor for the sector.

Domestic tourism and leisure outlook much stronger still than overseas

Short term intentions to take a UK summer holiday are holding up well, sustaining the jump from a couple of weeks ago, with 8% of travel activists already having booked. Intentions to go on a day out to a visitor attraction in the next 2 months are at a new high, yet so to is the proportion non-committal on when they'll next participate.

In spite of quarantine quashing, overseas holiday expectations are receding. Only 1 in 5 expect to take a holiday abroad this year, with twice as many assuming this now won't be until 2021. That airlines continue to be pasted on social media is not helping their cause.

Contents

The mood of the nation

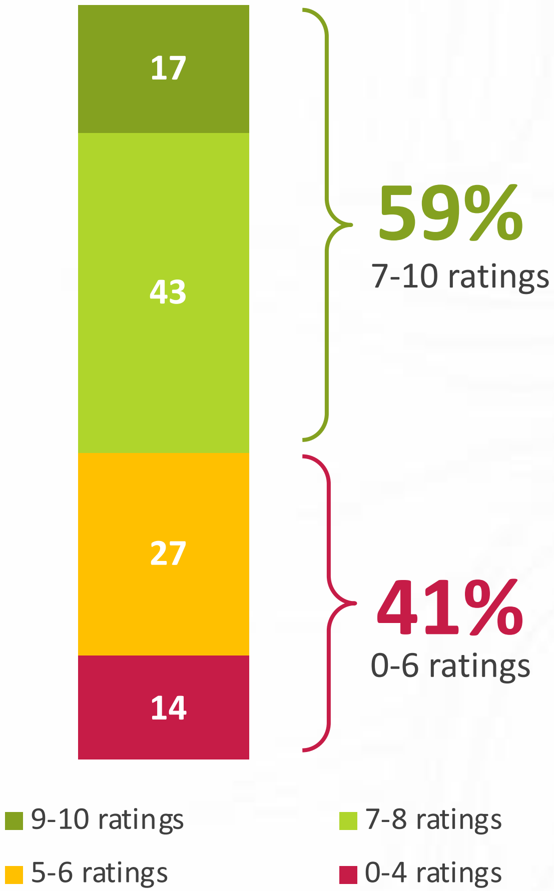
It seems that ingrained mind sets are determining the largely static overall national mood, rather than any short term response to events. This makes an understanding of our Covid-19 'confidence' segments all the more important

7 July – 9 July 2020

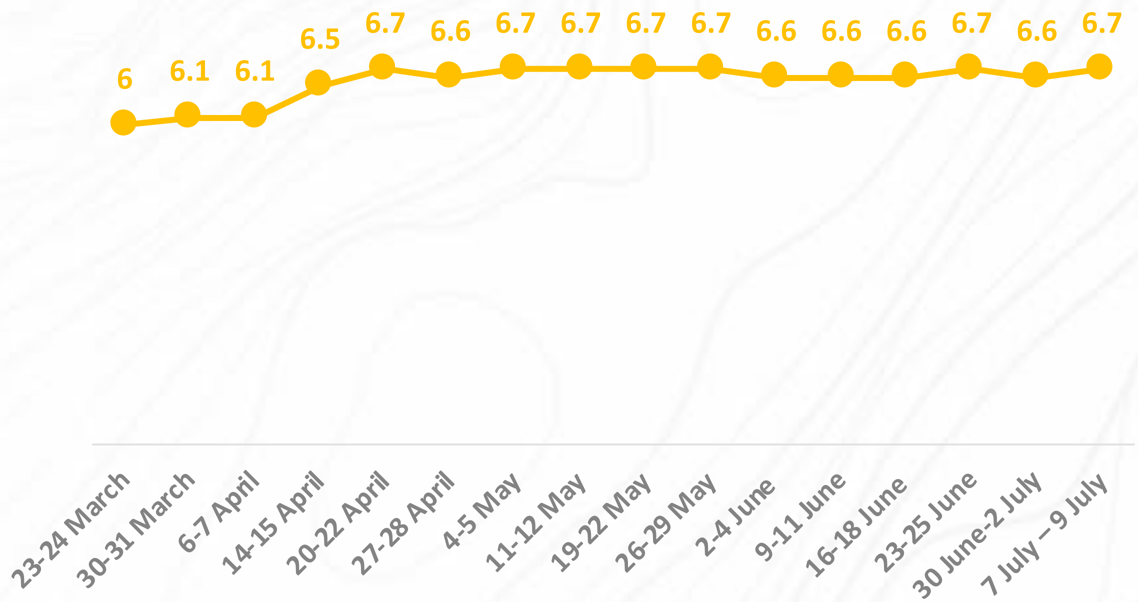
Average mood

6.7

7 July – 9 July 2020



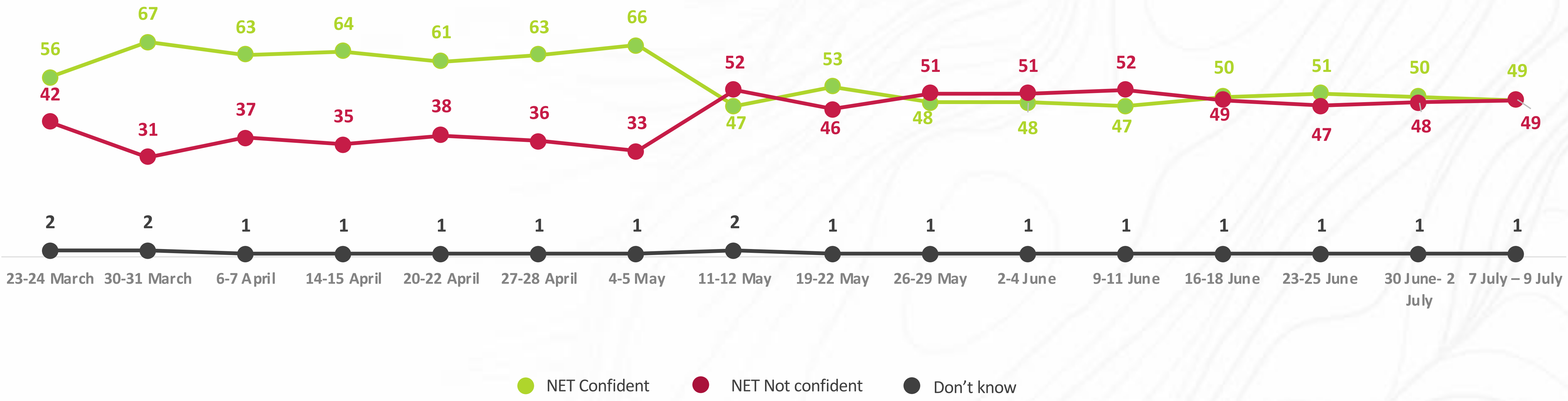
Average mood week-on-week (UK Adults)



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

With its strategy now apparently set on saving the economy, confidence in the government continues to be divided nationally, with opinion in favour or against associated with how concerned people are about the risks from coronavirus

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? (%)

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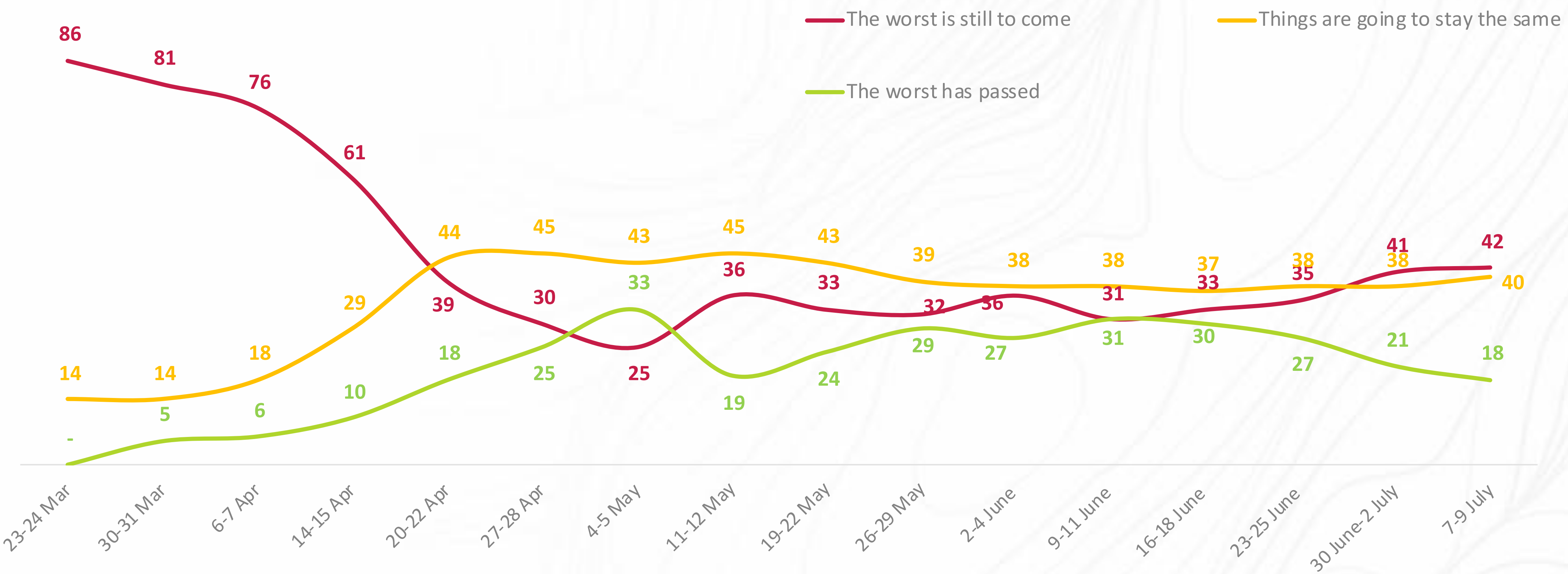
We continue to be a country divided in our hopes and fears. At the end of the hard lockdown 1 in 3 felt the worst had passed, a level not attained since. The re-opening of the experience economy has coincided with a rise in those fearing the worst is yet to come, indicating concerns about a second Covid-19 wave



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? (%)

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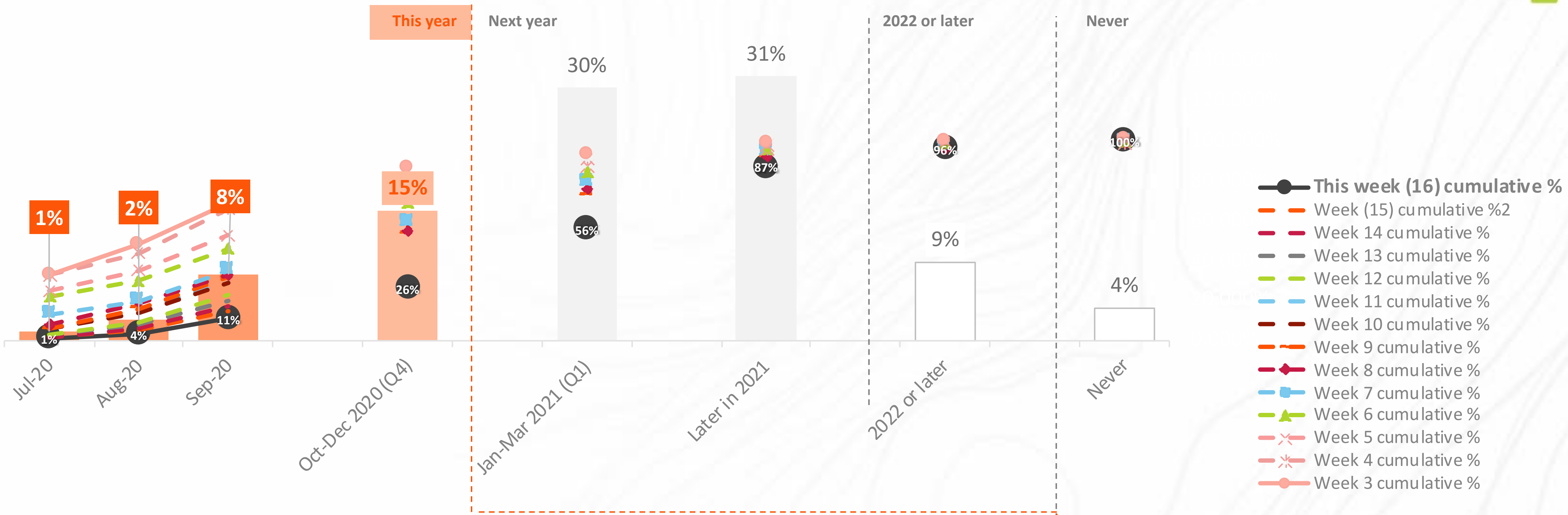
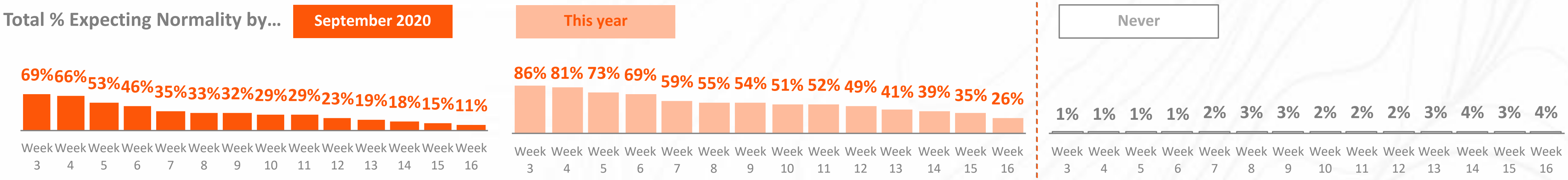
With a sharp dip this week, just 1 in 4 believe life will be back to something close to normal by end-2020. While more sectors of the economy are opening up they, very clearly, are far from normal in how they can operate



Total % Expecting Normality by…



Q16: Given what you know today, when do you think life will return to something close to normal?

A selection of themes underlying positive and negative sentiment

Visitor attractions have got a hero in @alva_uk chairman @bernarddonoghue - promoting the importance of tourism/ hospitality to the UK economy & representing their interests 24/7. Hope you lot appreciate him! @tourismforalluk @VisitBritain @LIFTfestival @HeritageFundUK

Supporting the industry

Turns out, social distancing actually makes rollercoasters BETTER?!? No queues, lots of room, and everything super clean. On a regular Saturday, @THORPEPARK would have over 10,000 guests - today it's just 2,000. Feels like having a queue-jump ticket and we're loving it

Effective rules enforcement

Check-in successful with @IOSTravel complete. One-way systems, hand sanitizer and facemasks to be worn at all times. The cafe is open and the only thing that feels really different is assigned seating on the plane.

Effective rules enforcement

A clean seal marks the spot! @englishlakes Low Wood Bay reassure guests of 10 key touch points given special disinfection by the cleaning team #GreatEscape

Supporting the industry

These are bank of switches in my bathroom/steam room. Help! There are times when the 'room tour' by porter/concierge (normally tedious) would be welcome. But no staff allowed in rooms... #GreatEscape @gilpinhotel

Lack of support

The queue for bag drop was pretty orderly at the Ryanair desks. I only have contact with one human who had to check my boarding pass and passport before getting my luggage tag. Even scanning and sending a bag onto the belt was self service.

Effective rules enforcement

@AltonTowers why is Rita not opened today? You had weeks to prepare to your opening day. That's is extremely bad effort. So disappointing

Lack of regular service

A little note about dinner... My hotel is doing buffets but it's not help yourself. Screens protect the food from human breath and a server dishes up for you. They're struggling though. Not enough servers, no queueing system & no timed entry makes it chaos at best.

Failing systems

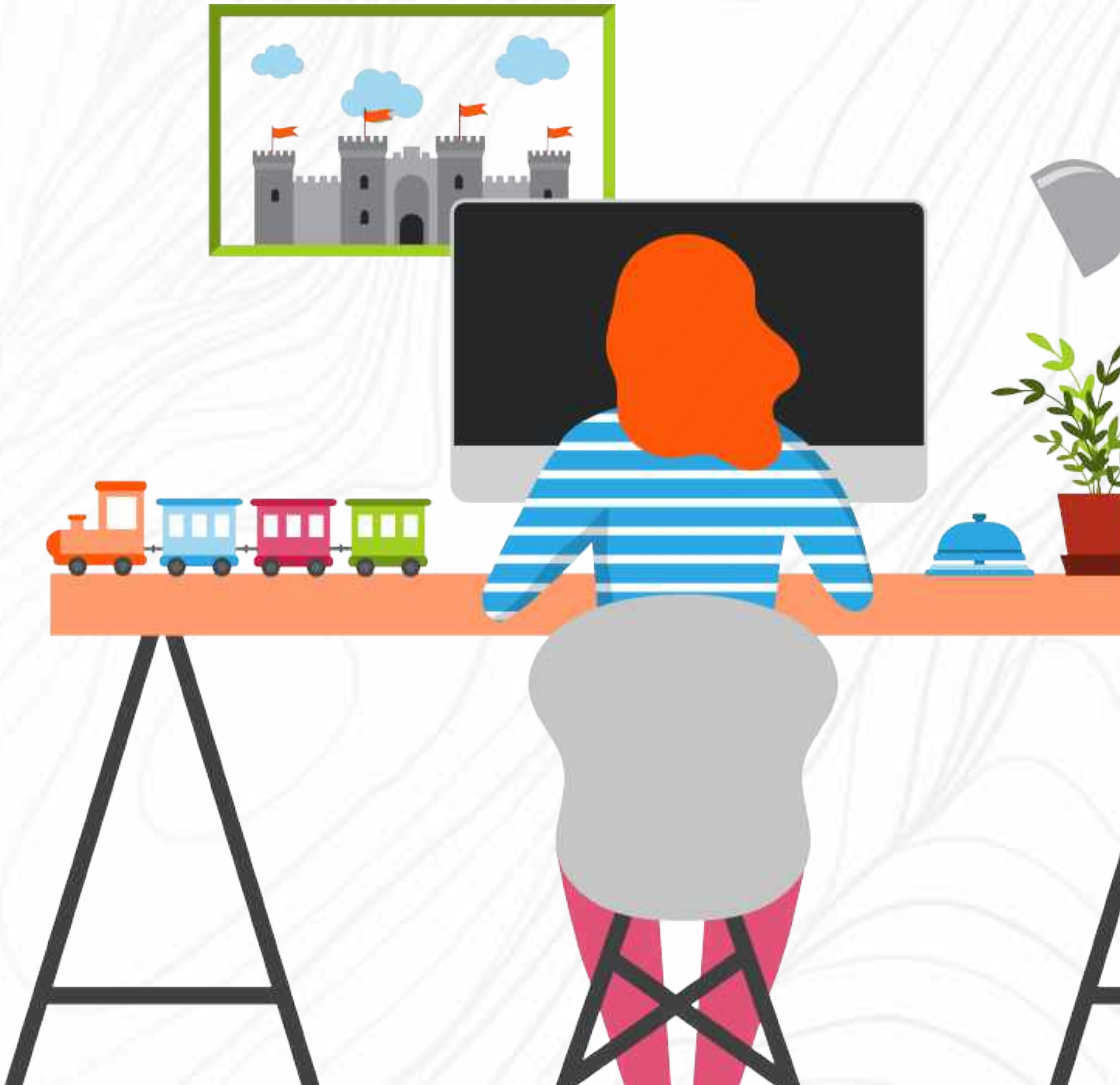
Of course, as soon as I got through security I had to pee. The toilets have a traffic light system to tell you when they're too full. I can see this getting chaotic in the foyer just outside. Hopefully they'll have a one way system & supervisors to help when busy

Failing systems

This #LakeDistrict visitor says her day was ruined when she was told off for "parking overnight", when she'd just pulled over to eat. She says she felt intimidated. You don't always get the full story from a tweet but this may need some explanation @nationaltrust @NT_TheNorth

Failing systems

Segmenting the market



What is a market segmentation?

Segmentation provides a structured way of looking at the market, providing clear, granular information about each group to plan from

The market segmentation will tell you…

WHERE		HOW		
Who to **TARGET**	How to **ACCESS** them	How to **ATTRACT** them	How to **RETAIN** them	How to **MAXIMISE SPEND**

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Introducing the coronavirus attitudinal market segments

Anxious Appreciator Hermits

Anxious about the virus, the government's handling of the situation and society's behaviour, but have valued the time at home. As such, they are likely to take longer to resume 'normal' behaviour.

COVID Impacted

This segment is suffering financially and is also concerned about the ongoing health implications of the virus and the potential impact of the easing of lockdown. They give the lowest mood ratings of all the segments.

COVID Cautious

While they are less concerned about the impact of the pandemic on themselves, this segment fears that we may not yet be past the worst and would prefer a longer lockdown. They are likely to be cautious in their own post-lockdown behaviour.

Pragmatic Policy Supporters

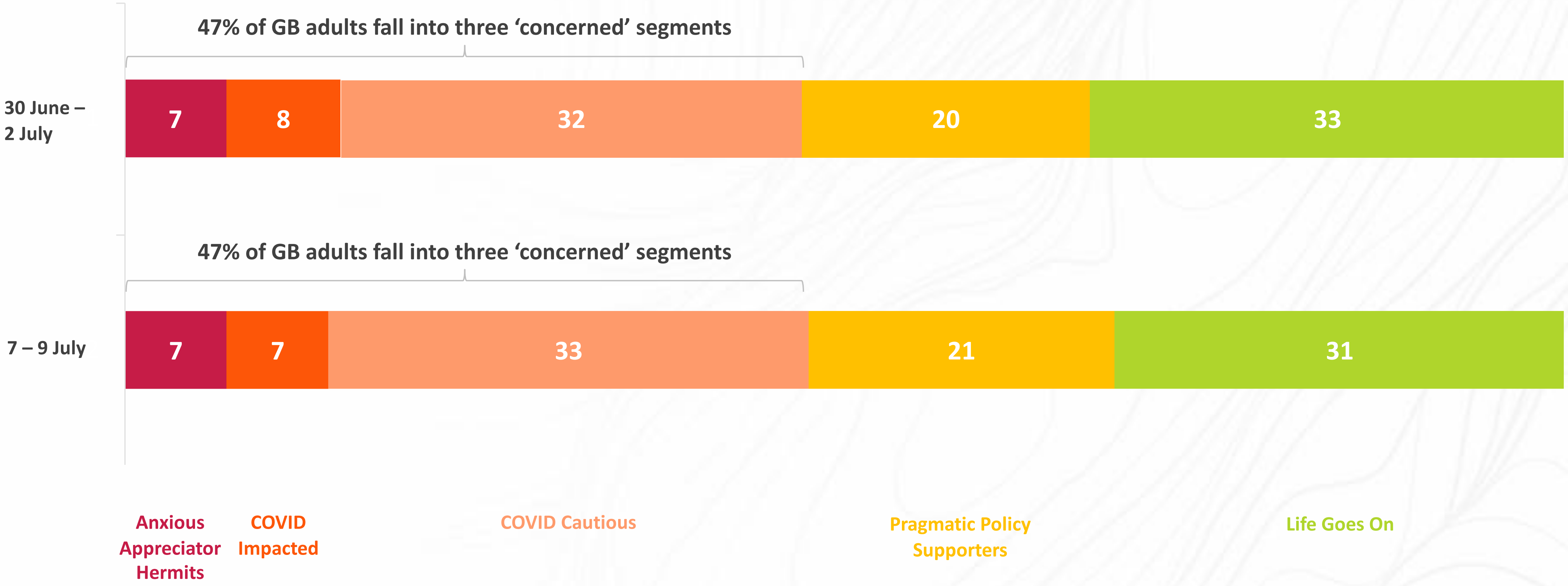
Concerned about the impact of COVID-19, but trusting and supportive of the government's policies and most believe the worst is behind us.

Life Goes On

Aching for lockdown to be lifted, this segment is not worried about the risks associated with COVID-19 and are supportive of lockdown lifting in order to protect the economy and get back to living their lives.

Segment size remains consistent with last week

Attitudes take time to change, so we would not expect significant changes in segment size week on week, but we will continue to monitor this to identify migration between segments.



Full detail about the segments can be found in last week's report: http://www.bva-bdrc.com/wp-content/uploads/2020/07/BVA-BDRC-Covid-19-Week-15-final-08072020.pdf

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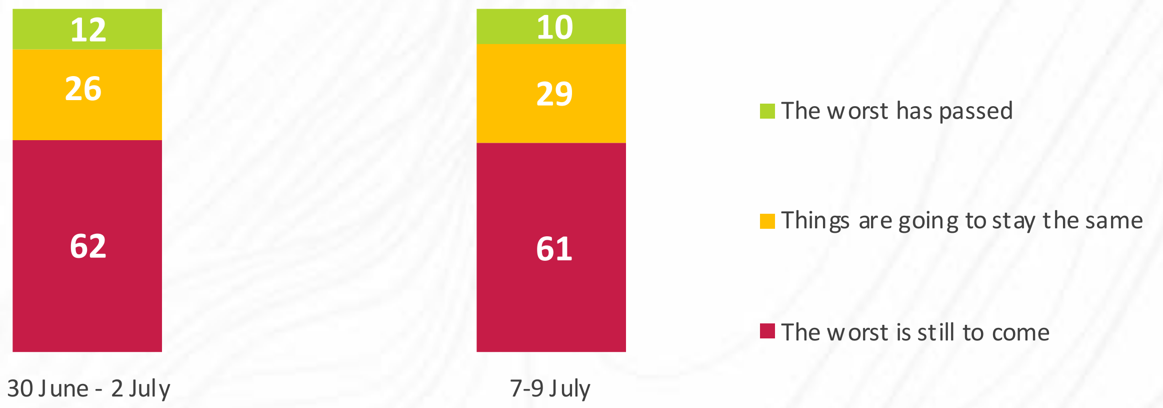
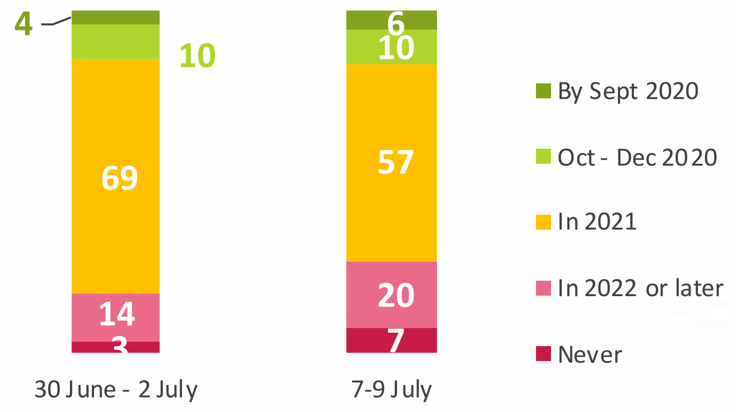
Overview – Anxious Appreciator Hermits

- Anxious Appreciator Hermits remain concerned that the worst is still to come, and nervous about the government's handling of the situation.
- The expectation of a return to normality has pushed back, with 27% of this group now expecting this to be 2022 or later. It could be that the announcement on 8th July that additional sporting facilities (e.g. pools, gyms) will be allowed to open later this month has merely increased anxiety for this segment.

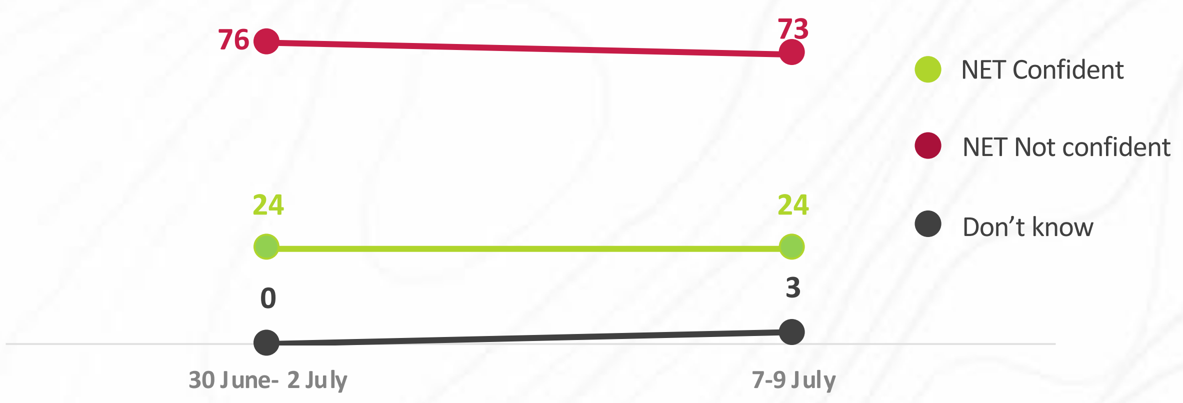
Perception of where we are (%)



% Expecting Normality…



Government handling (%)



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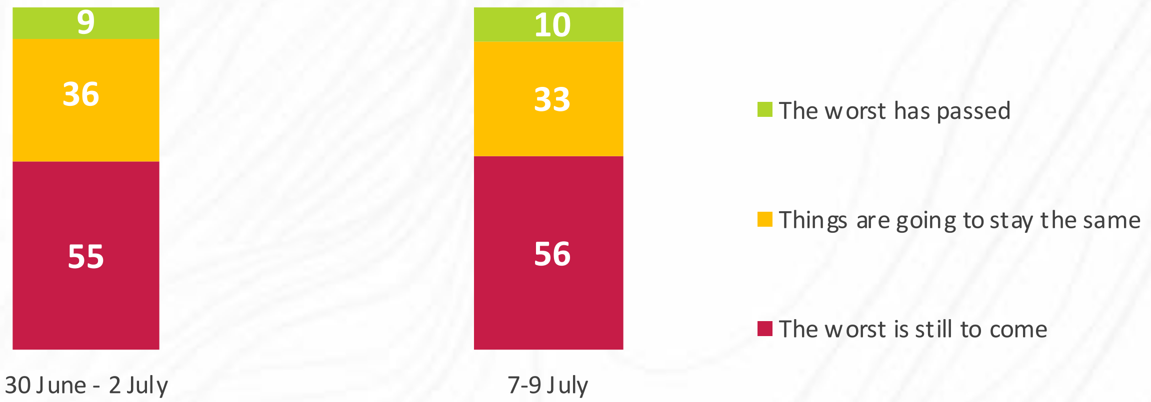
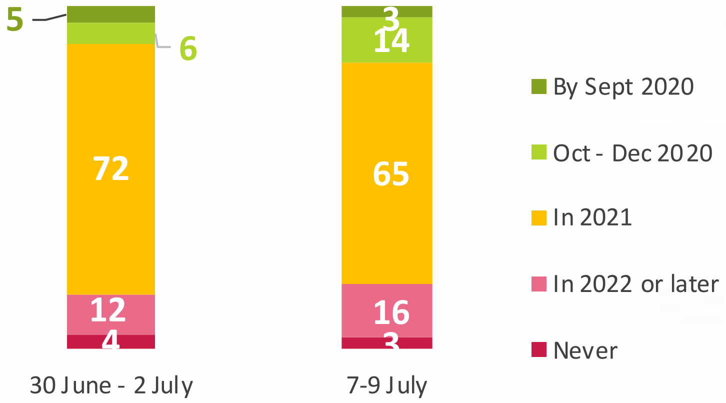
Overview – COVID Impacted

- Similar to Anxious Appreciator Hermits, only a quarter of COVID Impacted support the government's handling of the pandemic, and the majority believe the worst is still to come, with normality resuming sometime in 2021.

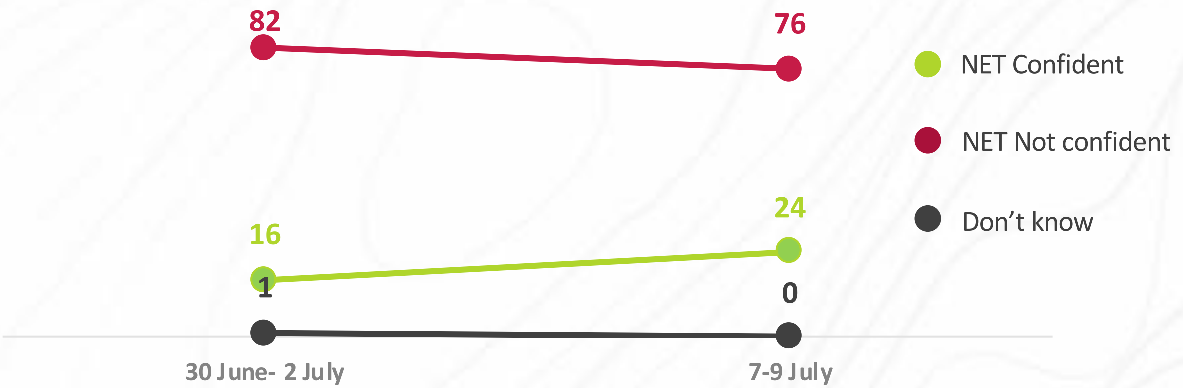
Perception of where we are (%)



% Expecting Normality…



Government handling (%)



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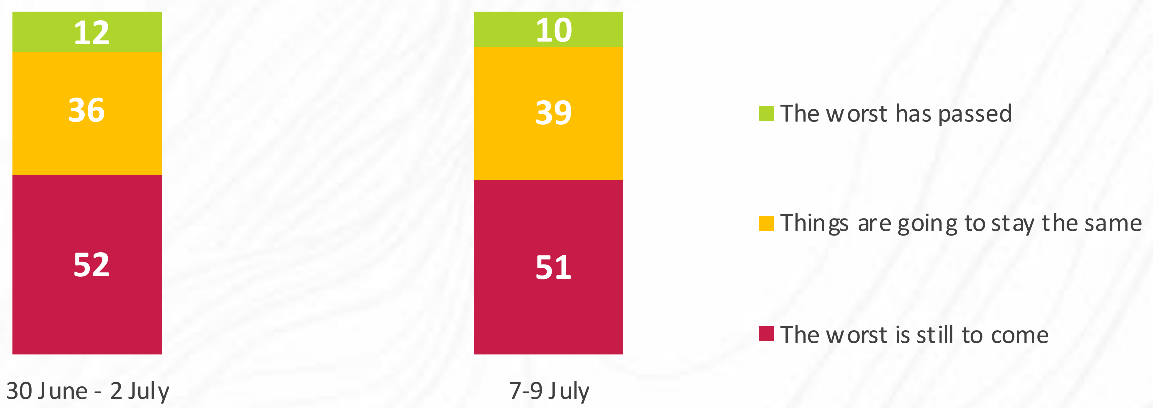
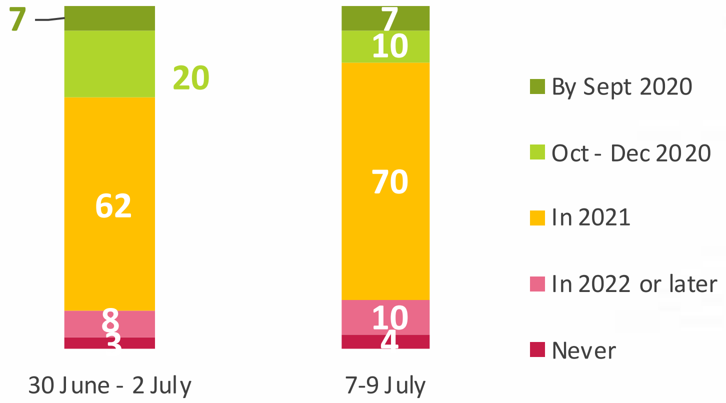
Overview – COVID Cautious

- COVID Cautious are somewhat more confident in the government's handling of the virus than the other 'concerned' segments.
- However, they are also weighted towards believing that the worst is still to come and do not expect a return to normality until sometime in 2021.
- Their expectation of a return to normality have extended, with only 17% (vs. 27% last week) expecting life to get back to normal in 2020.

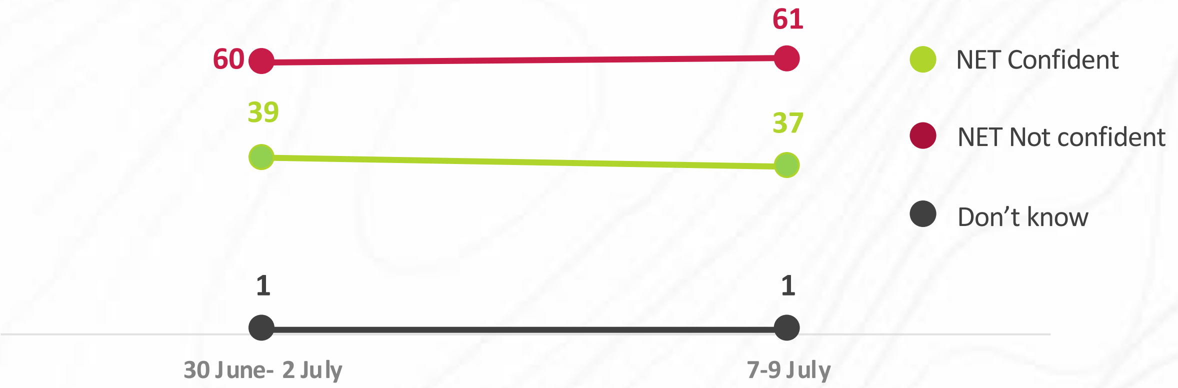
Perception of where we are (%)



% Expecting Normality…



Government handling (%)



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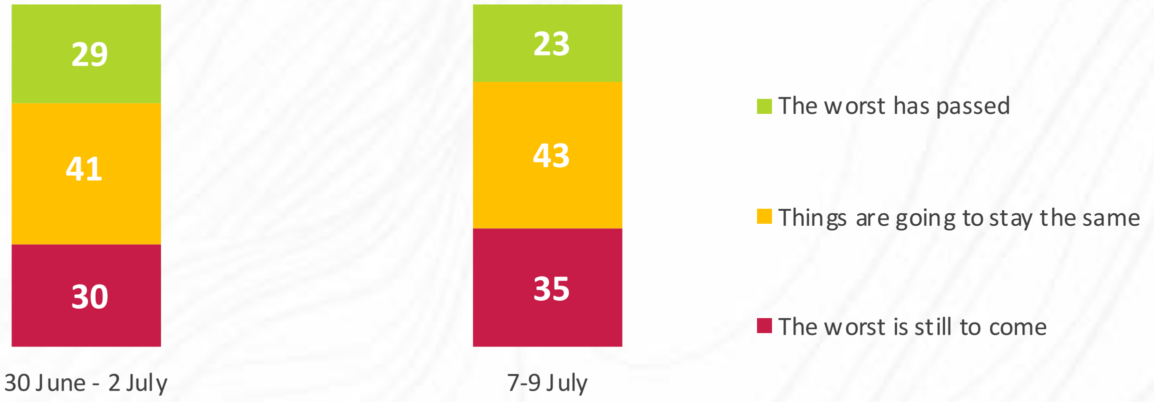
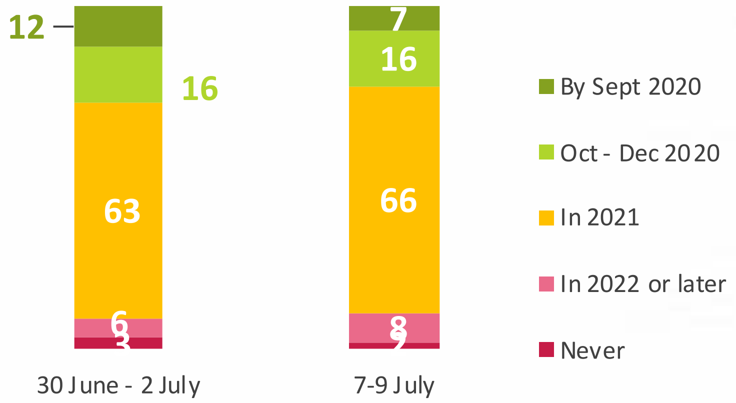
Overview – Pragmatic Policy Supporters

- Pragmatic Policy Supporters trust in the government's handling of the virus.
- Nearly two thirds expect things to stay the same or to improve, but a return to normality is still not expected until 2021 for most.
- Since the previous week, more of this group now sense the worst is still to come

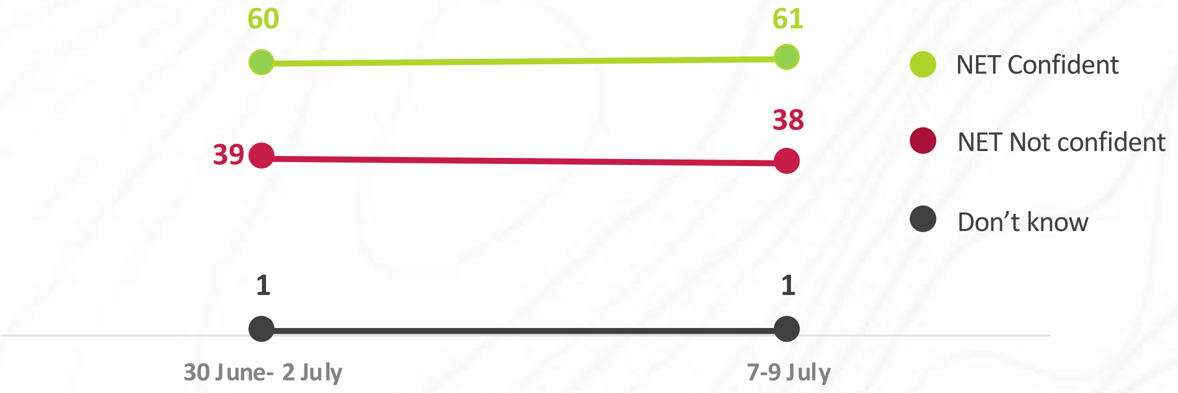
Perception of where we are (%)



% Expecting Normality…



Government handling (%)



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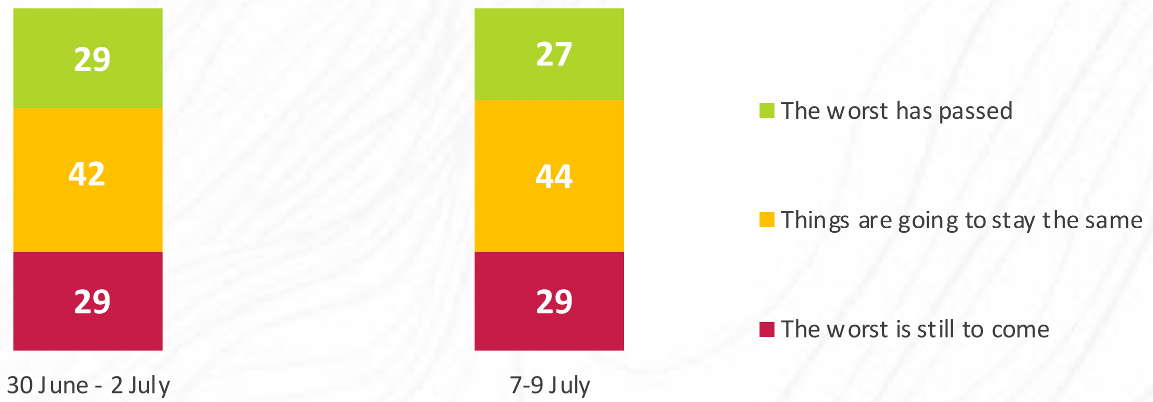
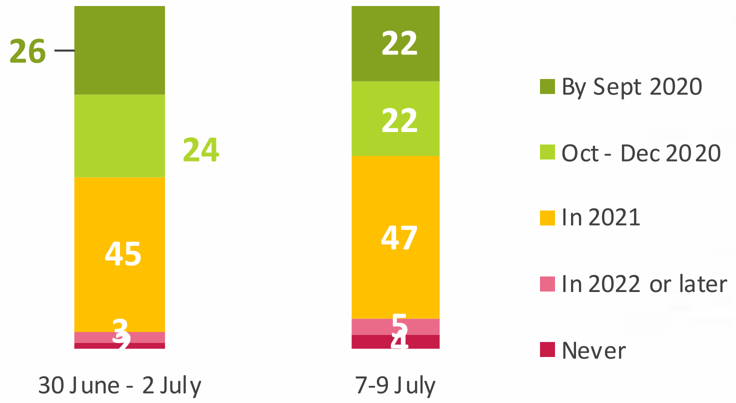
Overview – Life Goes On

- Even amongst the bullish 'Life Goes On' segment, we see a slight regression in expectations of when normality will return. Only 44% (vs. 50% last week) expect normality by the end of 2020.
- Nevertheless, they continue to trust in the government and they are the most optimistic that the worst has passed.

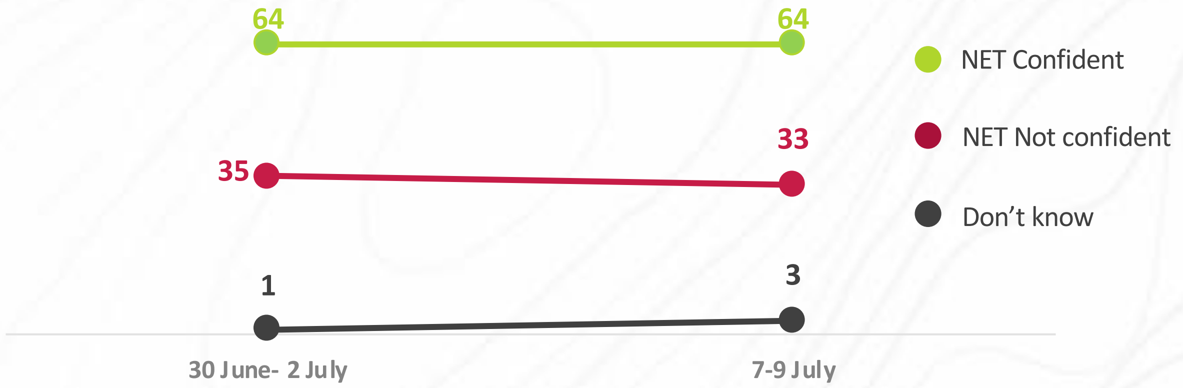
Perception of where we are (%)



% Expecting Normality…



Government handling (%)



Segments: Holidays and Travel

- Under normal circumstances, all segments are active in the holiday and travel sector, with between 4-6% going on holiday in the UK and between 8-11% staying in paid for accommodation between January and March 2020, depending on the segment.
- Travel has been rare across all segments since it became permissible again in June 2020, but is more likely amongst 'Life Goes On', 'Pragmatic Policy Supporters' and 'COVID Cautious'.

	Segment (size)	Anxious Appreciator Hermits (7%)	COVID Impacted (7%)	COVID Cautious (33%)	Pragmatic Policy Supporters (21%)	Life Goes On (31%)
Jan-Mar 2020	Went UK holiday	4%	4%	5%	6%	5%
	Went overseas holiday	2%	4%	7%	6%	5%
	Stayed in paid for accommodation	11%	11%	11%	9%	8%
	Travelled by plane	5%	5%	8%	7%	6%
Since June 2020	Went UK holiday	0%	0%	1%	1%	1%
	Went overseas holiday	0%	0%	0%	0%	0%
	Stayed in paid for accommodation	0%	0%	0%	1%	1%
	Travelled by plane	0%	0%	1%	0%	0%

q1a- And when exactly was the last time you did the following activity/activities

Segment: Transport

- Perhaps from necessity, the three most ‘concerned’ segments are just as likely to be using public transport as the more ‘relaxed’ segments.
- Perhaps due to their demographic profile (tend to be older (35-64 years old) without dependent children at home), COVID Cautious are the heaviest users of air travel, so addressing the concerns of this audience will be important for airlines.

	Segment (size)	Anxious Appreciator Hermits (7%)	COVID Impacted (7%)	COVID Cautious (33%)	Pragmatic Policy Supporters (21%)	Life Goes On (31%)
Jan-Mar 2020	Travelled by bus	17%	22%	21%	19%	16%
	Travelled by train	17%	17%	19%	15%	15%
	Travelled by plane	5%	5%	8%	7%	6%
Since June 2020	Travelled by bus	4%	5%	5%	5%	5%
	Travelled by train	1%	2%	2%	1%	3%
	Travelled by plane	0%	0%	1%	0%	0%

q1a- And when exactly was the last time you did the following activity/activities

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Segments: Leisure

- As we would expect the 'Life Goes On' segment has been more active going out to restaurants and pubs, but we are seeing some activity across all segments, in particular with regards to shopping.
- Nonetheless, there is a long way to go to reach pre-COVID levels of engagement.

	Segment (size)	Anxious Appreciator Hermits (7%)	COVID Impacted (7%)	COVID Cautious (33%)	Pragmatic Policy Supporters (21%)	Life Goes On (31%)
Jan-Mar 2020	Went to a restaurant	37%	30%	33%	33%	25%
	Went to a pub	25%	28%	27%	28%	20%
	Went to a shopping mall/shopping trip	34%	29%	28%	29%	19%
Since June 2020	Went to a restaurant	1%	1%	1%	2%	4%
	Went to a pub	0%	2%	2%	2%	3%
	Went to a shopping mall/shopping trip	7%	6%	6%	8%	7%

q1a- And when exactly was the last time you did the following activity/activities

Segments: Attractions

- Attraction visiting was popular across all segments prior to lockdown.
- Only a tiny minority across any segments have visited indoor attractions, zoos or theme parks. However, around 1 in 10 have visited scenic areas/ parks – edging towards the proportions seen between Jan-Mar 2020. While Q1 tends to be a quieter period for parks, this should still be viewed as a positive result given the shorter timeframe and more limited availability of ticketed attractions.

	Segment (size)	Anxious Appreciator Hermits (7%)	COVID Impacted (7%)	COVID Cautious (33%)	Pragmatic Policy Supporters (21%)	Life Goes On (31%)
Jan-Mar 2020	Went to an outdoor park/scenic area	17%	16%	17%	17%	13%
	Visited a theme park	2%	1%	1%	3%	3%
	Visited a zoo	3%	3%	2%	2%	3%
	Visited an aquarium	1%	2%	1%	1%	2%
	Visited a museum/gallery	7%	9%	8%	7%	6%
Since June 2020	Went to an outdoor park/scenic area	9%	13%	10%	10%	9%
	Visited a theme park	0%	0%	0%	0%	0%
	Visited a zoo	1%	2%	0%	1%	1%
	Visited an aquarium	0%	0%	0%	0%	0%
	Visited a museum/gallery	0%	0%	0%	0%	0%

q1a- And when exactly was the last time you did the following activity/activities

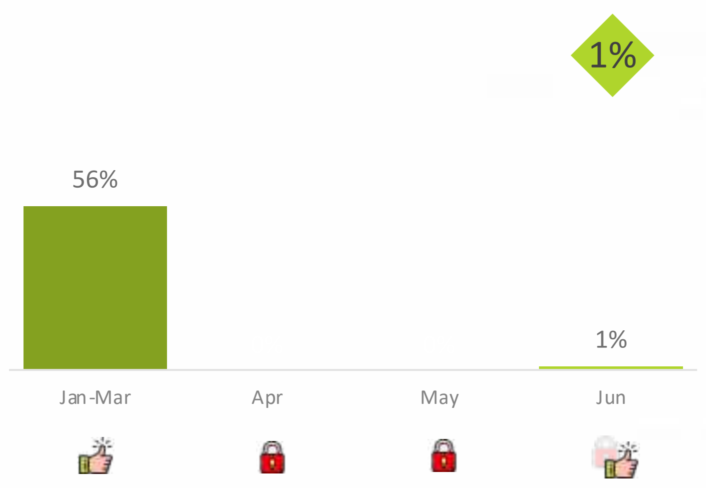
Travel and leisure

Market Recovery Tracking: Go on a day out to a visitor attraction

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

With visitor attractions having now been opened for a few weeks people are becoming more confident in visiting, with 35% likely to visit by the end of August- the highest proportion seen since lockdown. Equally, though, there is a growing proportion who are non-committal as to when they will visit.

Visited a visitor attraction since permitted



This week

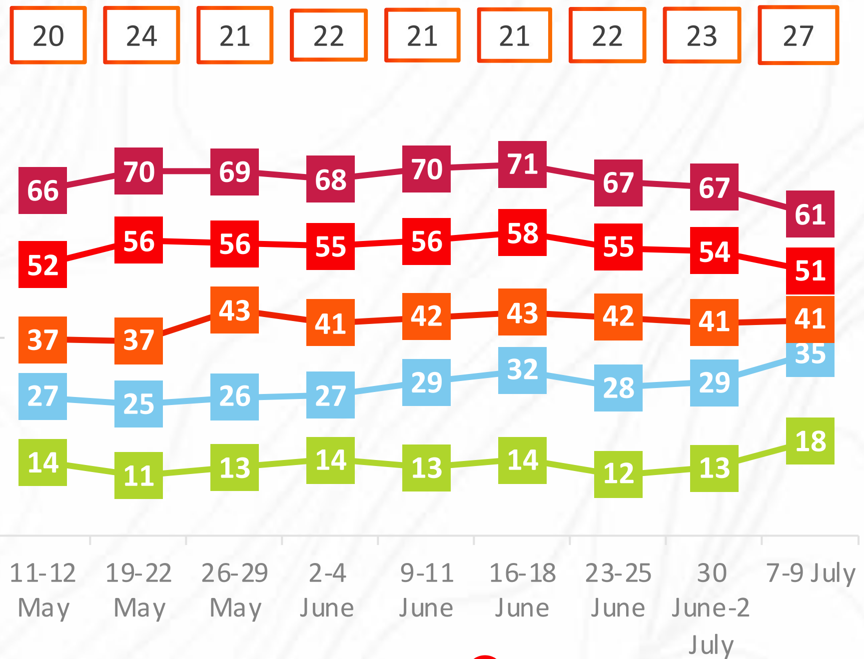
6.1

Average time **since** the activity last done

2.7

Average time **before** the activity next done

When the activity will next be done



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

NET participation since pandemic / activity permitted

Activity is not permitted

Activity is permitted

Q12. Given what you know today, when do you anticipate doing the following? Base all
Q1a. And when exactly was the last time you did the following activity/activities?

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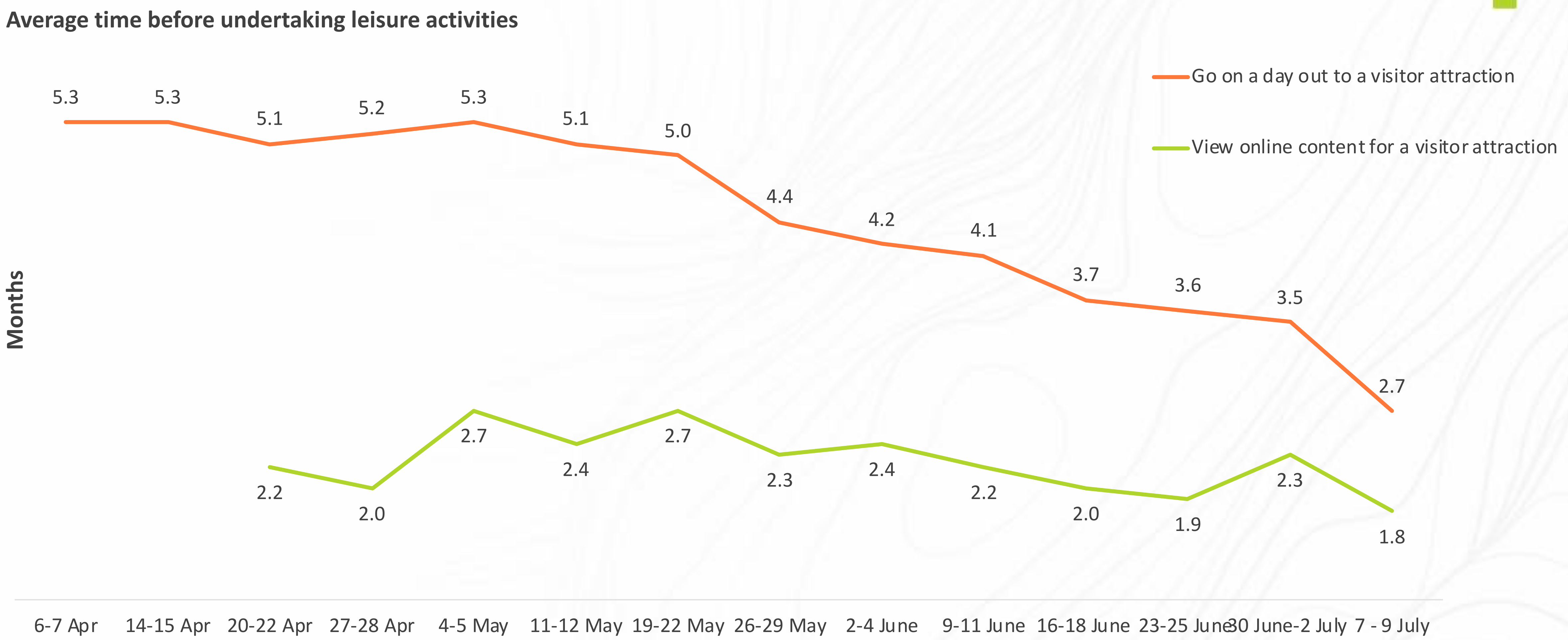
Among those intending to go to a visitor attraction (who have a definite view as to when they will do so) average lead times have fallen sharply this week

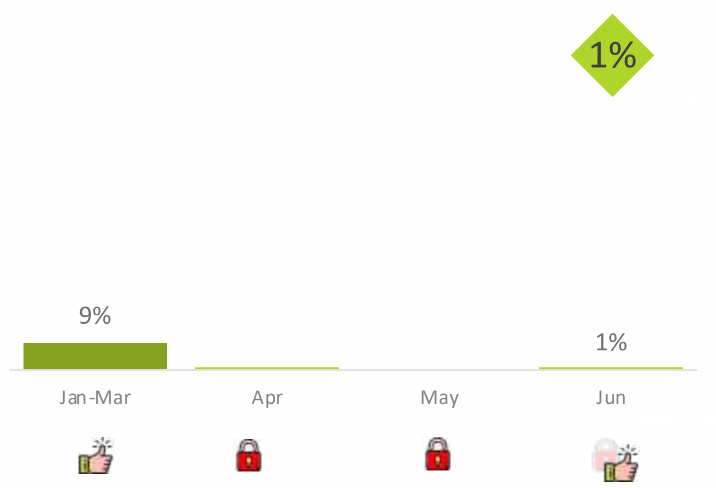


Market Recovery Tracking: Visit a zoo

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

When it was announced they were able to re-open we saw an increase in the proportion who would visit a zoo by the end of August. However, as time has moved on and other types of activities and experiences have reopened, visit intentions for zoos have softened. Perhaps we will see a reversal in this downward trend in the coming weeks as a TV appeal fronted by David Attenborough to urge people to donate to the conservation charity behind London Zoo gains traction.

Visited a zoo since permitted



This week

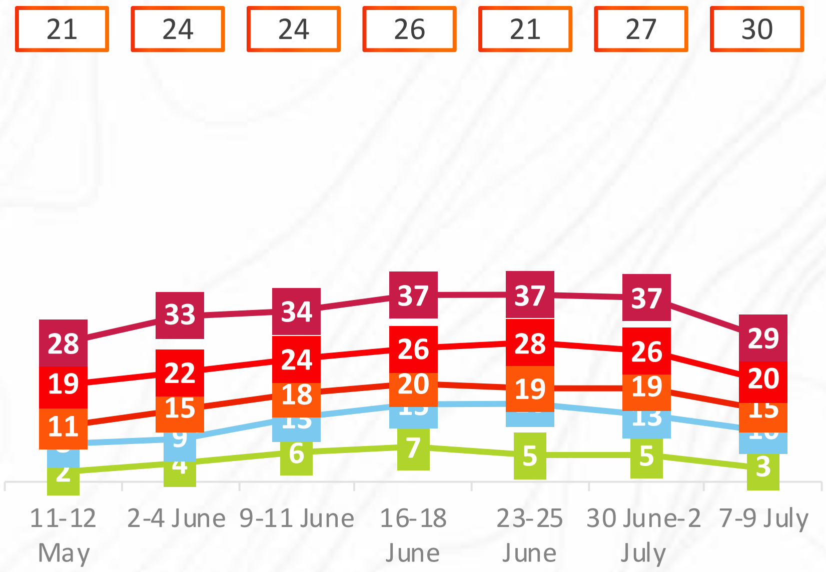
7.5

Average time **since** the activity last done

3.8

Average time **before** the activity next done

When the activity will next be done



NET participation since pandemic / activity permitted

Activity is not permitted

Activity is permitted

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

q12bnew. And when do you anticipate next doing the following? Base all
Q1a. And when exactly was the last time you did the following activity/activities?

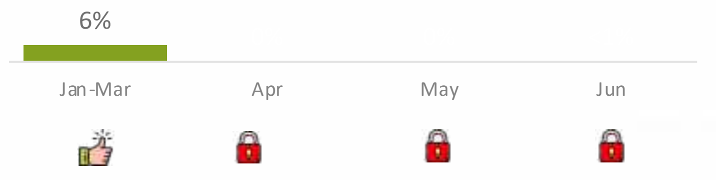
ALLIGATOR BVA BDRC

Market Recovery Tracking: Visit an aquarium

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

As with the proportion who plan to visit a zoo, the proportion who plan to visit an aquarium has fallen – with 14% planning to visit by the end of December 2020 the lowest level recorded since this research began.

Visited an aquarium since permitted

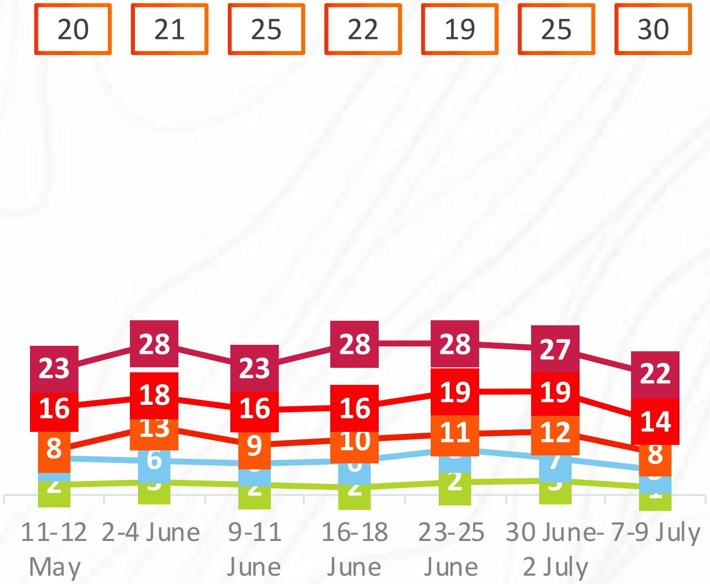


This week

8.1
Average time **since** the activity last done

4.7
Average time **before** the activity next done

When the activity will next be done



% NET participation since pandemic / activity permitted

Activity is not permitted

Activity is permitted

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

q12bnew. And when do you anticipate next doing the following? Base all
Q1a. And when exactly was the last time you did the following activity/activities?

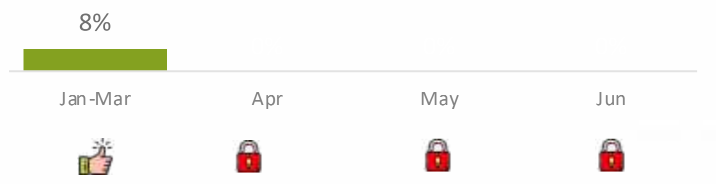
ALLIGATOR BVA BDRC

Market Recovery Tracking: Visit a theme park

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

Likelihood to visit a theme park in the summer has fallen, with only 9% planning to do so by the end of September. Overall, 25% of people plan to visit a theme park by the end of December 2020- the lowest proportion recorded

Visited a theme park since permitted

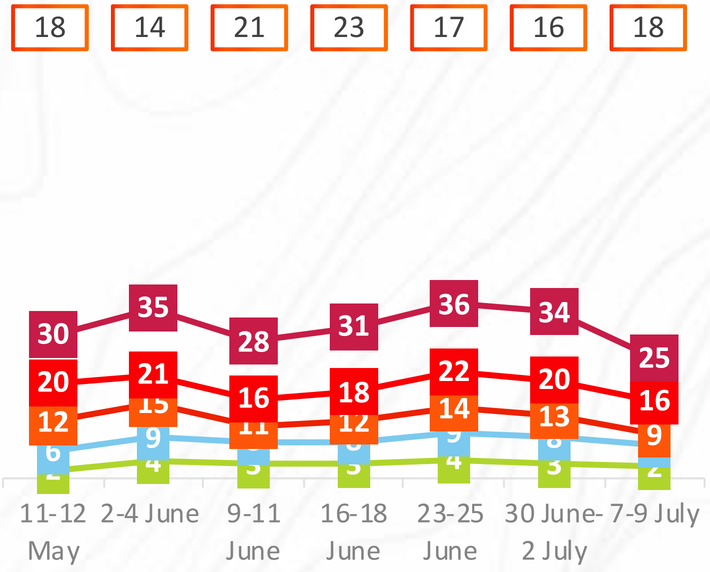


This week

7.8
Average time **since** the activity last done

4.5
Average time **before** the activity next done

When the activity will next be done



- % NET participation since pandemic / activity permitted
- Activity is not permitted
- Activity is permitted

- 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

q12bnew. And when do you anticipate next doing the following? Base all
Q1a. And when exactly was the last time you did the following activity/activities?

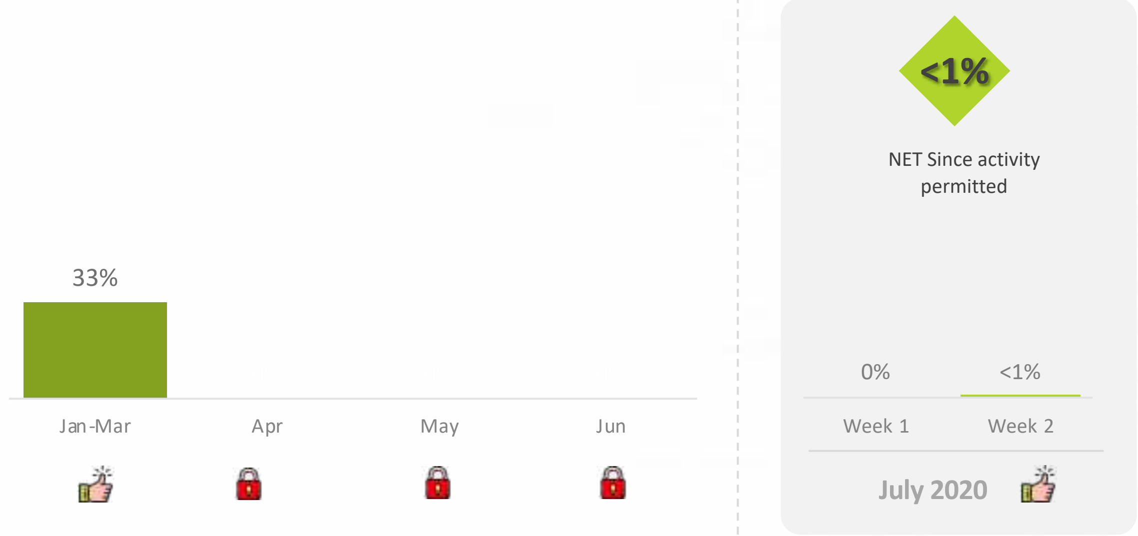
ALLIGATOR BVA BDRC

Market Recovery Tracking: Visit a museum/gallery

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

Museums and galleries record a rise in the proportion likely to visit this attraction type by the end of August up slightly to 16%. Overall, the proportion who would visit by the end of the year remained relatively steady at 46%. With the large national museums, such as the Natural History Museum and the Science Museum announcing August reopening dates, we may begin to see further increases in the proportion planning to visit a museum.

Visited a museum/gallery since permitted



This week

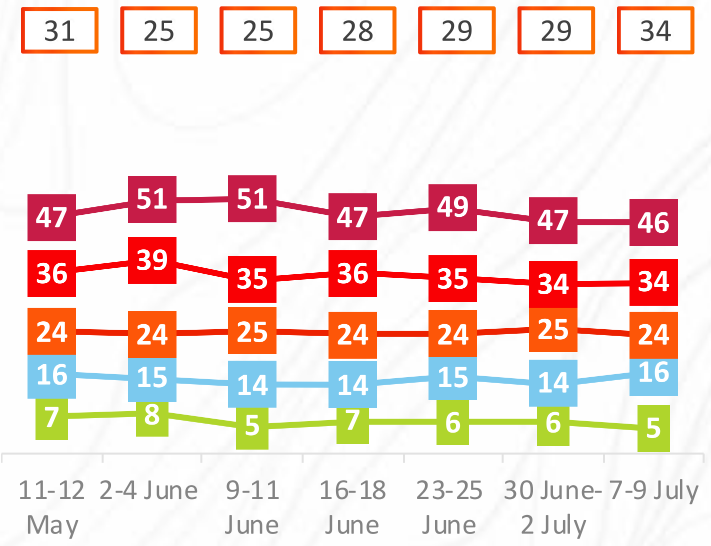
6.7

Average time **since** the activity last done

3.8

Average time **before** the activity next done

When the activity will next be done



NET participation since pandemic / activity permitted

Activity is not permitted

Activity is permitted

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

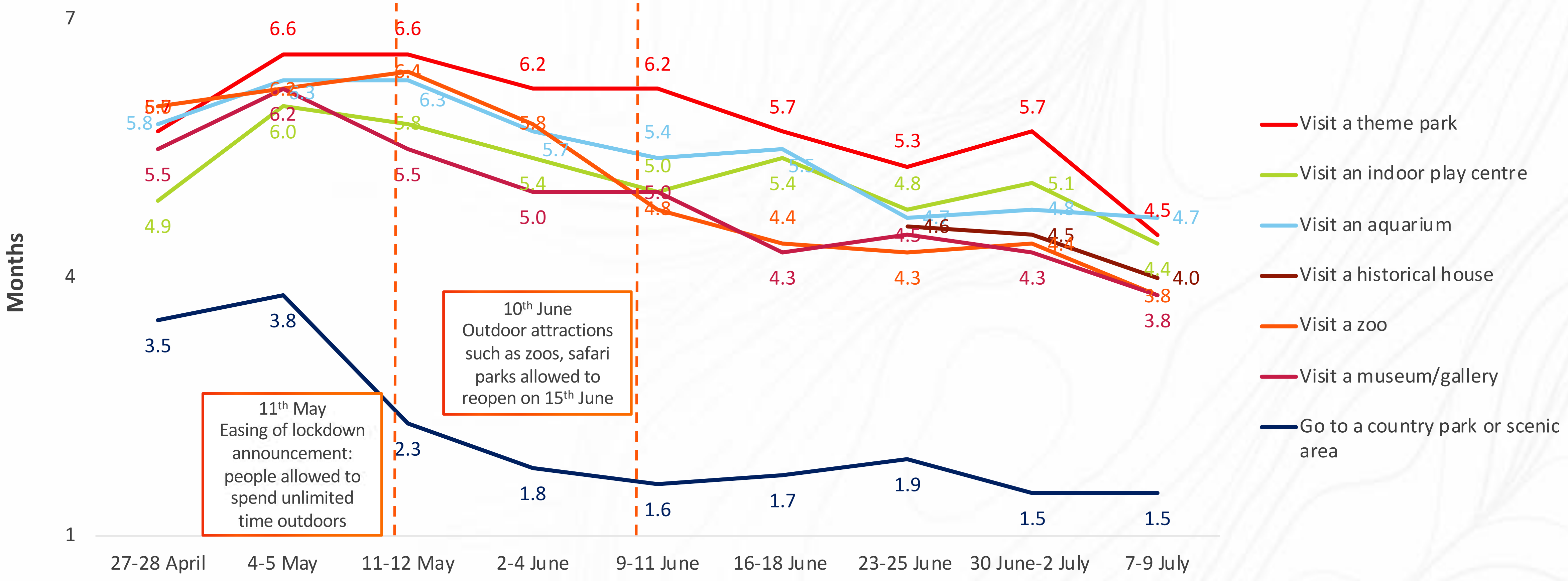
q12bnew. And when do you anticipate next doing the following? Base all
Q1a. And when exactly was the last time you did the following activity/activities?

ALLIGATOR

BVA BDRC

For those who plan to visit an attraction this year, the lead time for doing so has decreased, among those who commit to a likely date

Average time before undertaking leisure activities



ALLIGATOR

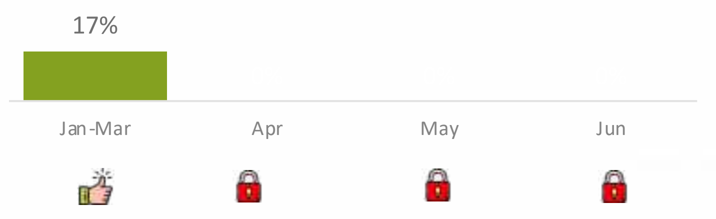
BVA BDRC

Market Recovery Tracking: Visit a small historic house

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

Small historic houses do not have the extended tail of deferred intentions to visit that characterise other categories of attraction, but, equally for many they do not come up high on planned activities either, with nearly half their potential visitors not knowing when they may next visit.

Visited a small historic house since permitted



This week

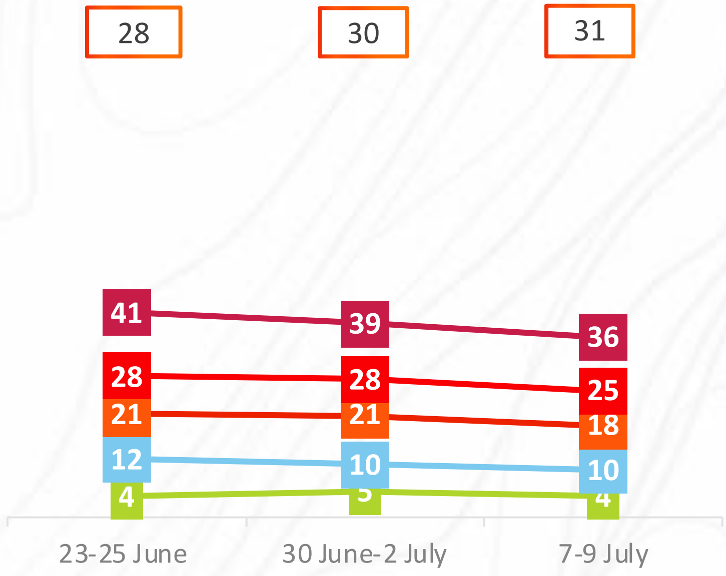
7.5

Average time **since** the activity last done

4.0

Average time **before** the activity next done

When the activity will next be done



NET participation since pandemic / activity permitted

Activity is not permitted

Activity is permitted

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

q12bnew. And when do you anticipate next doing the following? Base all
Q1a. And when exactly was the last time you did the following activity/activities?

ALLIGATOR BVA BDRC

On social media – as the attraction and leisure industry began to reopen its doors, many visited outdoor attractions such as theme parks and gardens in particular. Some complained many weren’t observing social distancing, yet others were impressed with the systems and precautions taken.

“Had it myself today at Legoland for refusing to move forward into spaces which would mean I had people either side of me - at least 5 different adults involved in shouting abuse at me- one even coming close to me and coughing at me. Disgusting humans some people.”

“Had a super day at @kewgardens. Obviously the first place I’d visit on lockdown lifting! Nice to see lots of social distancing and sanitiser everywhere. So many plants I wanted to take home! #kew #kewgardens”

“Was very chilled today at London zoo. It was nice to be out supporting the attraction industry. The social distancing rules in play were excellent and the zoo really looked beautiful.”

“Thanks @LEGOLANDWindsor our kids had a great day today, measures to keep people safe seemed balanced and reasonable (and not excessive). All the team have been awesome to our girls. Id say reopening day 1 was a success. See you again tomorrow for day two!”

“Had a great time exploring #warwickcastle checking it out ahead of full reopening TODAY (also - far easier to learn history here than #homeschooling) #goodtogo #weareopen #uktourism #englishsummertime”

“@SEALIFEManc So I've paid for an Annual pass and you now want me to pay £1 per person to book so that I can actually visit. The money from my pass has been providing you with cash flow during this crisis. Now you expect me to pay on top of what I've already spent to use my pass. Not impressed.”

“Unfortunately social distancing is not in operation, just 1 minute into opening. Even though announcements and staff are trying to enforce it. @CWOA”

“I went to @ShowcaseCinemas in Coventry on Saturday for the first time since March. One way system and social distancing in place, online seat allocation and food/drinks ordering, the whole thing was excellent. If cinemas can do it, theatres and music venues can.”

“Just went with my fiancé up to central London for first time in months. Went to my favourite place St Paul's cathedral and was pleasantly surprised to find it open for prayers! Blessed to go back in this beautiful place.”

“So good to be back in @wakehurst_kew! Great that it's open to be public again, and really exciting to see the early stages of the American prairie take shape!”

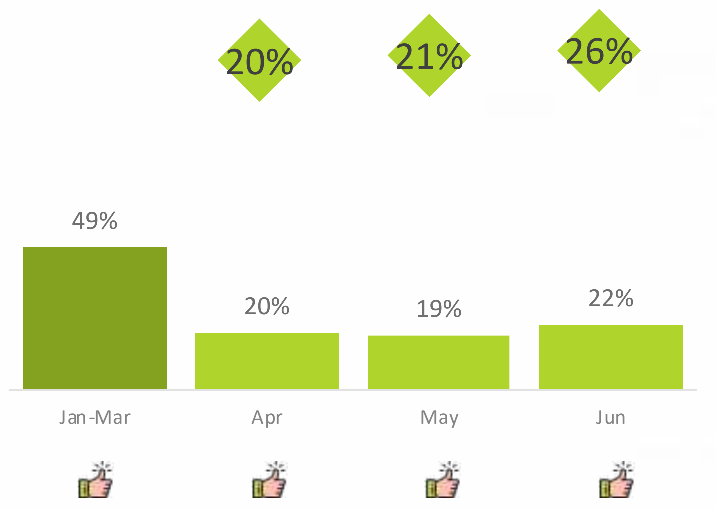
“@WarwickCastle Are you doing timed tickets? If not, how do you make sure the entrance doesn’t get too crowded?”

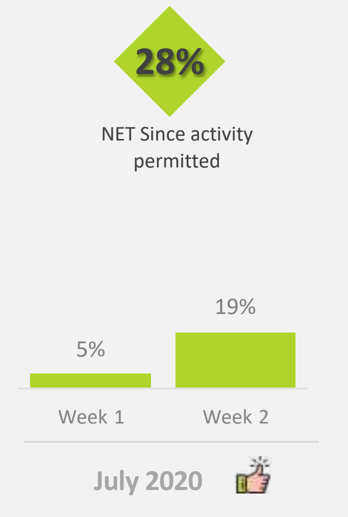
Market Recovery Tracking: Go to an outdoor park or scenic area

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

Outdoor spaces have been a focus both for actual and intended leisure behaviour throughout the coronavirus crisis, but as other attractions slowly become more available it is little surprise that some of the intentions to visit, while remaining very high, have softened just a bit.

Went to an outdoor park or scenic area since permitted





This week

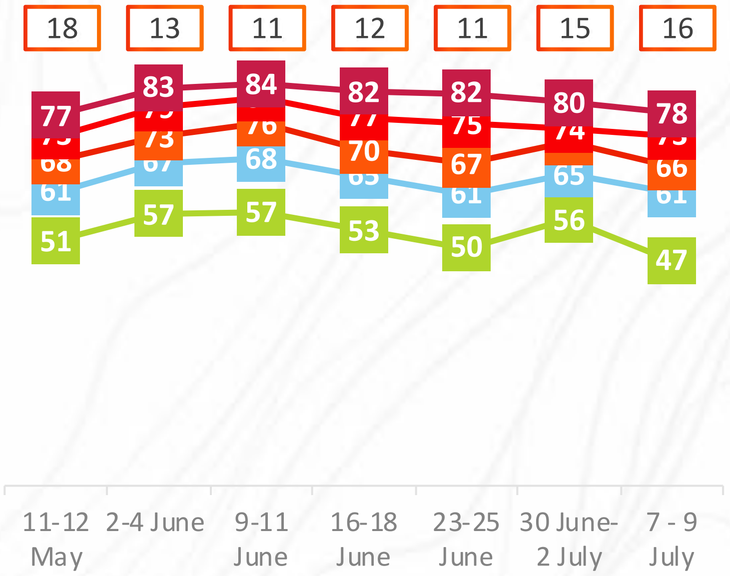
4.7

Average time **since** the activity last done

1.5

Average time **before** the activity next done

When the activity will next be done



NET participation since pandemic / activity permitted

Activity is not permitted

Activity is permitted

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

q12bnew. And when do you anticipate next doing the following? Base all
Q1a. And when exactly was the last time you did the following activity/activities?

ALLIGATOR BVA BDRC

Market Recovery Tracking: Visit an indoor play centre

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

Indoor play centres continue to remain closed, and it appears that people are becoming less optimistic about an opening date, with 19% people likely to visit by the end of the year, the lowest proportion recorded

Visit indoor play centre since permitted

This week

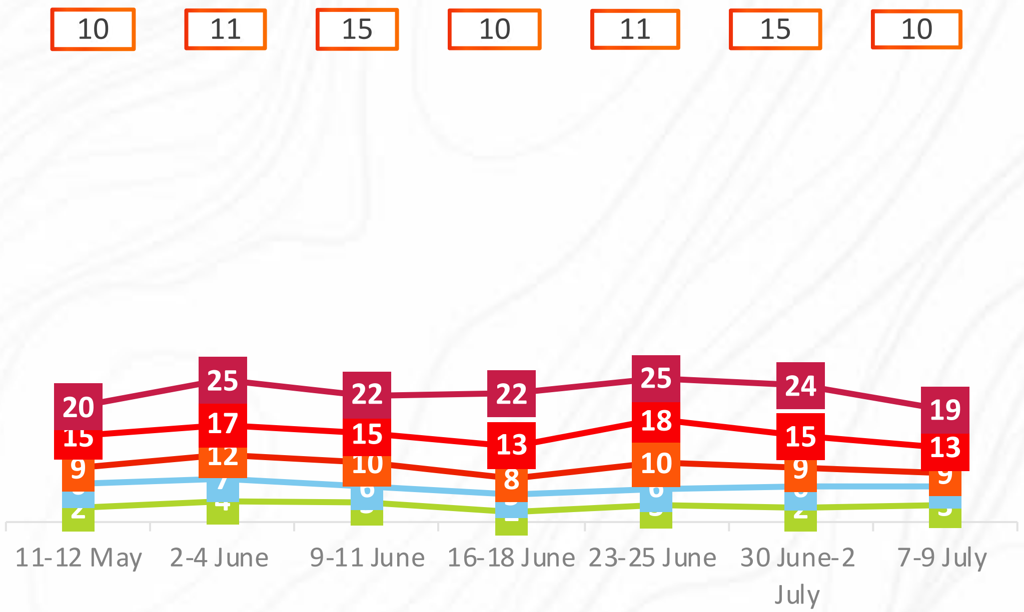
6.6

Average time **since** the activity last done

4.4

Average time **before** the activity next done

When the activity will next be done



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

NET participation since pandemic / activity permitted
Activity is not permitted
Activity is permitted

q12bnew. And when do you anticipate next doing the following? Base all
Q1a. And when exactly was the last time you did the following activity/activities?

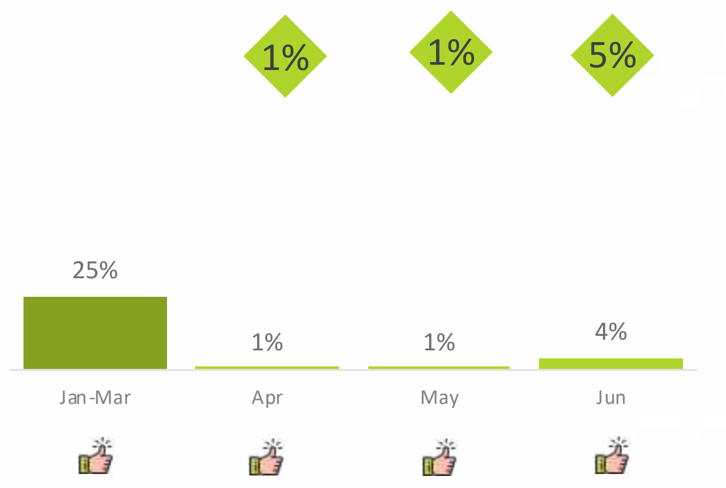
ALLIGATOR BVA BDRC

Market Recovery Tracking: Book a UK holiday

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

The proportion of people planning to book a UK holiday by September 2020 peaked last week, with a drop back to 37% this week, but the figures have held up for bookings to be made in July and August

Book a UK holiday since permitted



This week

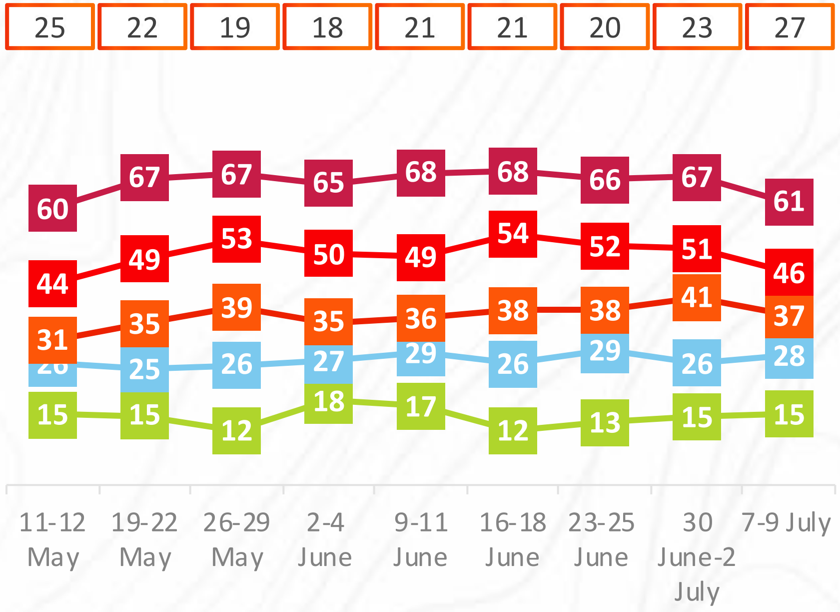
7.7

Average time **since** the activity last done

3.4

Average time **before** the activity next done

When the activity will next be done



NET participation since pandemic / activity permitted

Activity is not permitted

Activity is permitted

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

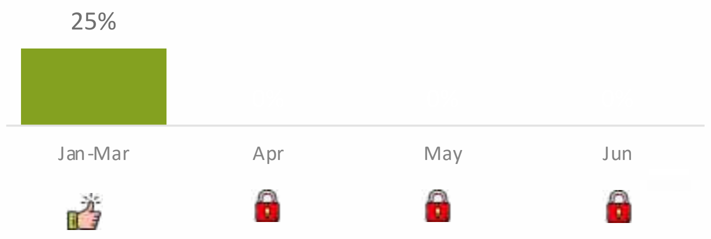
VB2ac: - Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip
Q1a. And when exactly was the last time you did the following activity/activities?

Market Recovery Tracking: Go on a UK holiday

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

Since being allowed to go on a UK holiday 2% of our travel activists already have done so. Looking ahead we see that around 1 in 3 are likely to go on a UK holiday by September 2020.

Go on a UK holiday since permitted



This week

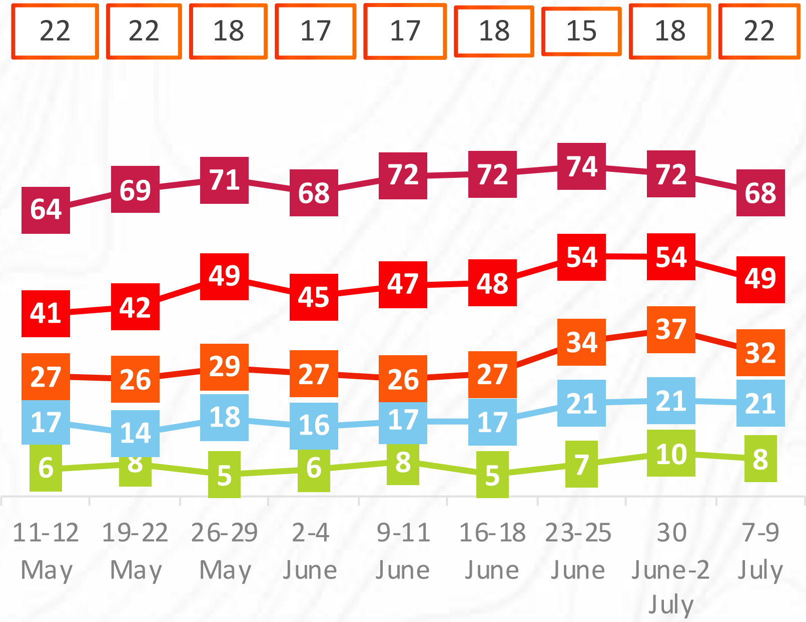
7.5

Average time **since** the activity last done

4.2

Average time **before** the activity

When the activity will next be done



NET participation since pandemic / activity permitted

Activity is not permitted

Activity is permitted

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

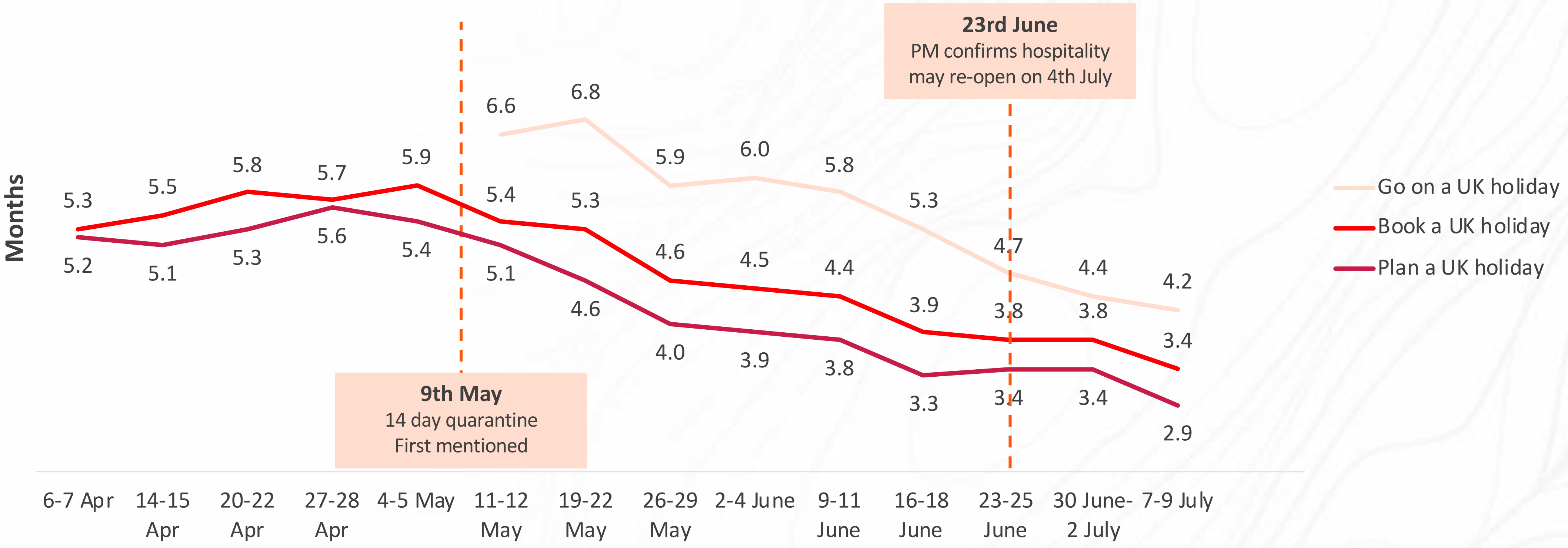
By end of August 2020

By end of July 2020

VB2ac: - Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip
Q1a. And when exactly was the last time you did the following activity/activities?

Timelines for going on a holiday within the UK continue to shorten

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



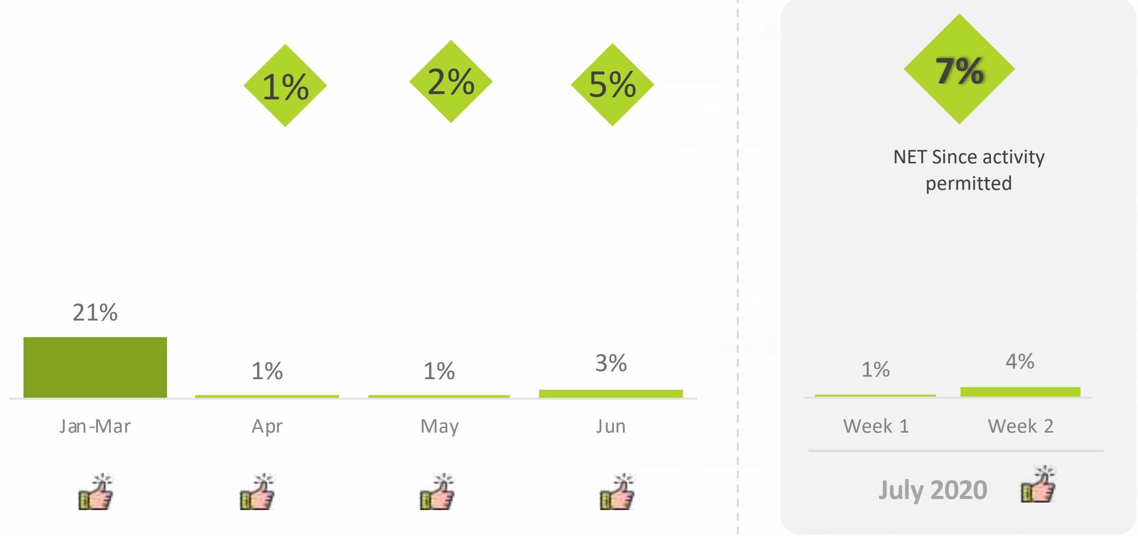
ALLIGATOR BVA BDRC

Market Recovery Tracking: Book an overseas holiday

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

Since the announcement of borders reopening for non-essential travel, we have seen 7% of people book an overseas holiday. Even so it is now only a quarter of travel activists who expect to book an overseas holiday by the end of 2020 – many more will not do so until next year.

Book an overseas holiday since permitted



This week

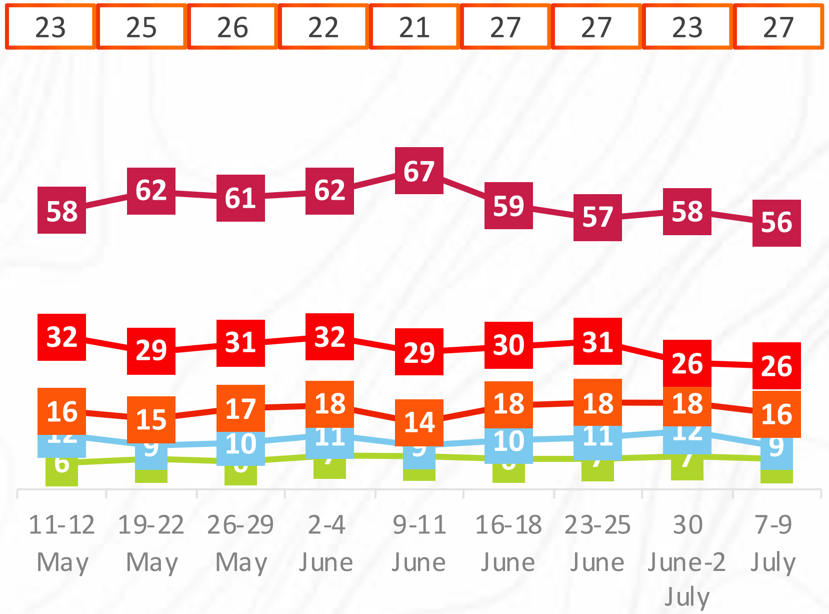
6.5

Average time **since** the activity last done

5.8

Average time **before** the activity next done

When the activity will next be done



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

% NET participation since pandemic / activity permitted
Activity is not permitted
Activity is permitted

Q12. Given what you know today, when do you anticipate doing the following? Base all
Q1a. And when exactly was the last time you did the following activity/activities?

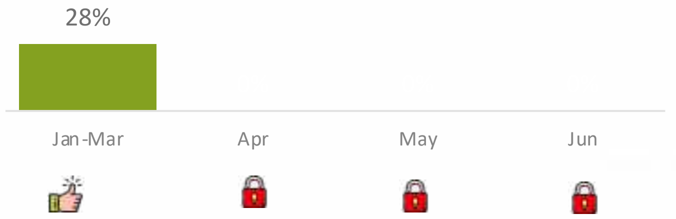
ALLIGATOR BVA BDRC

Market Recovery Tracking: Go on an overseas holiday

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

Only 1 in 5 travel activists now anticipate going on an overseas holiday this year. Twice this number do not expect a foreign holiday until 2021.

Go on an overseas holiday since permitted

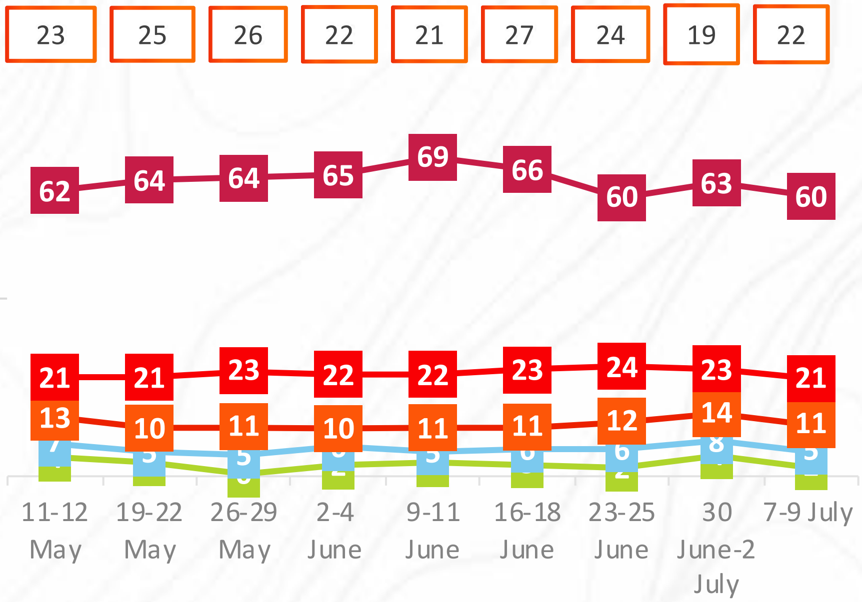


This week

7.2
Average time **since** the activity last done

7.0
Average time **before** the activity

When the activity will next be done



NET participation since pandemic / activity permitted
Activity is not permitted
Activity is permitted

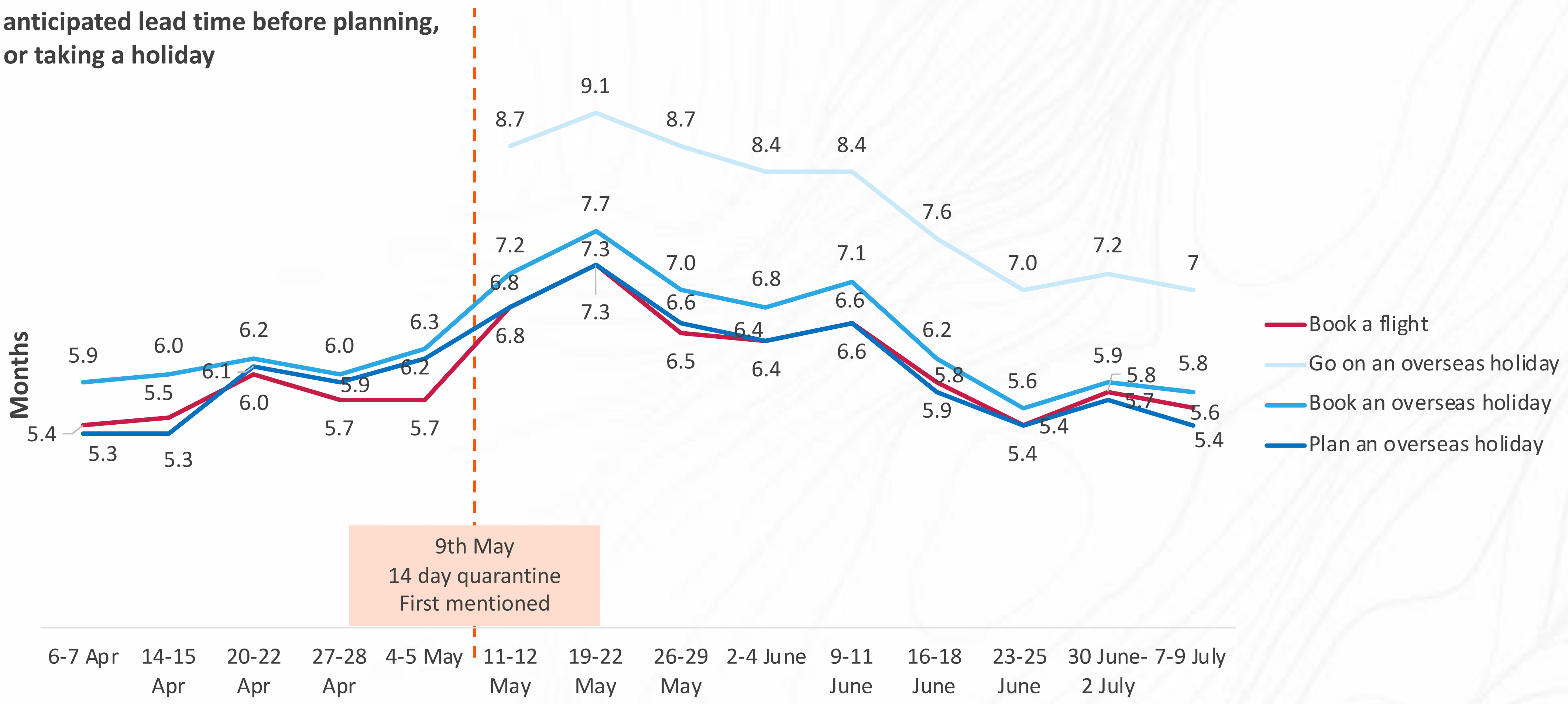
Planning on doing it but don't know when
By end of April 2021 or later
By end of December 2020
By end of September 2020
By end of August 2020
By end of July 2020

Q12. Given what you know today, when do you anticipate doing the following? Base all
Q1a. And when exactly was the last time you did the following activity/activities?

ALLIGATOR BVA BDRC

Average lead times for international travel have stabilised, perhaps influenced by a fear of a second wave of the virus and continued uncertainty about quarantine arrangements, both in the UK and overseas

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



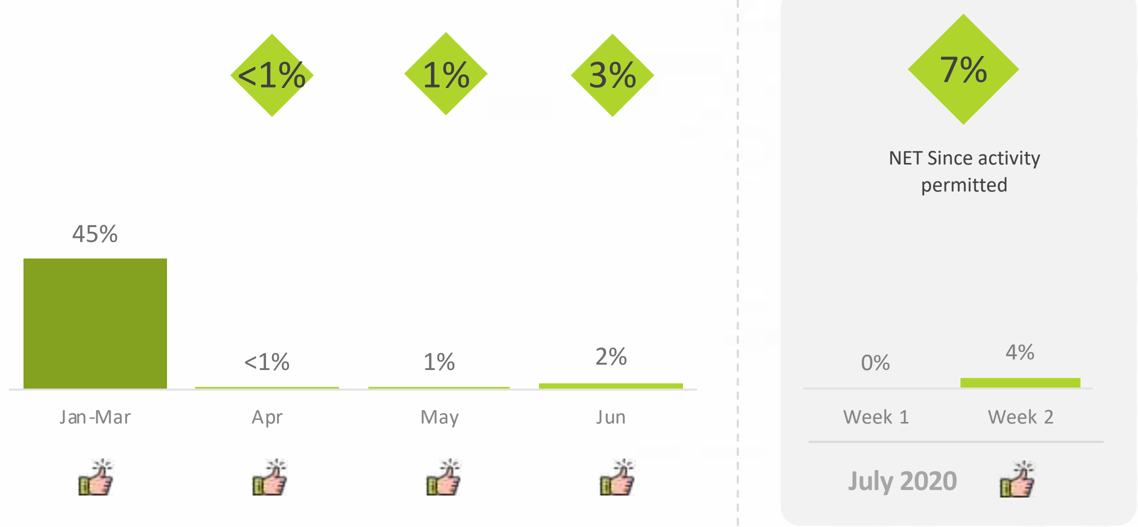
ALLIGATOR BVA BDRC

Market Recovery Tracking: Book hotel accommodation

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

This week’s intentions data show a very encouraging short-term picture. With little change overall in those intending to book, it suggests that some previously thinking it’d be next year are bringing their decisions forward. And remember – this fieldwork took place before the announcement of a cut in VAT in the sector. We must be mindful of false dawns, and on a weekly basis the numbers can change, but the last four weeks have shown good progress. The importance of an opening date is also apparent in the month-by-month record. This question is “book hotel accommodation”, not necessarily “stay in a hotel”, but nonetheless the suppressing effect that the uncertainty had on bookings is apparent.

Book hotel accommodation since permitted



This week

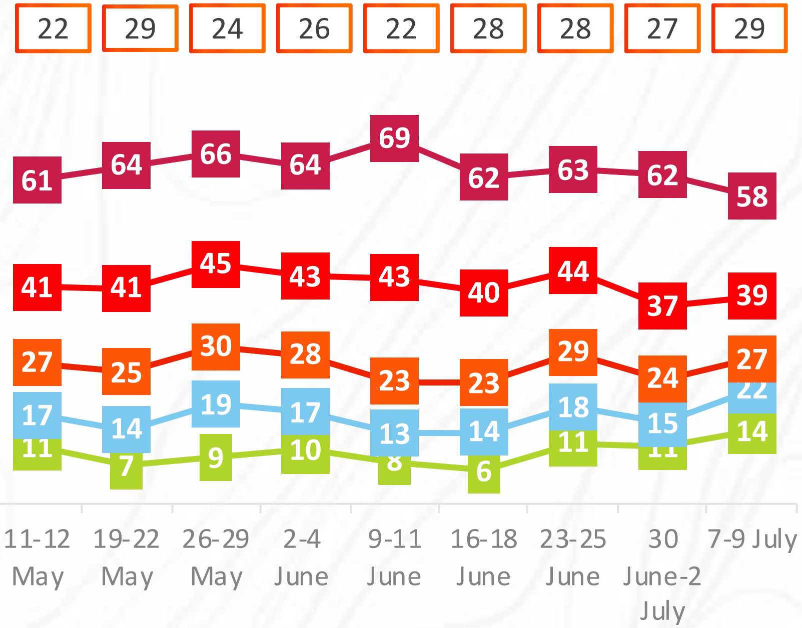
6.4

Average time **since** the activity last done

3.8

Average time **before** the activity next done

When the activity will next be done



NET participation since pandemic / activity permitted	Activity is not permitted
Activity is permitted	

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

Q12. Given what you know today, when do you anticipate doing the following? Base all
Q1a. And when exactly was the last time you did the following activity/activities?

ALLIGATOR

BVA BDRC

On social media – Positive customer feedback as hotels start re-opening, with appropriate safety measures in place such as temperature checks, sanitizer and one-way systems

"Time to check in to my hotel, @TheAthenaeum. The first night away from my flat in four months. Lots of safety measures (screens, temperature check, one-way system, sanitizer, etc) but delighted to be welcomed by smiling faces. #GreatEscape @TelegraphTravel"

"The windswept look at check in as my temperature is taken by Lucy @tallandbayhotel. The forms are already waiting in the room and a one-way system is in place. It all feels very safe, responsible and so far, fairly normal. Slightly surreal to be back in a hotel after so long."

"The restaurant at @chewtonglen before its first dinner service in more than three months. Menus are scanned through a QR code and diners are sat very far apart. Very much looking forward to this later."

"#AltonTowers hotel update: if you're staying at the hotel there's a new temperature check you'll have to pass but the staff are super helpful. Well done @altontowers we've had a brilliant day and can't wait for the Rollercoaster Restaurant tonight! Roller coaster #GreatEscape"

"Temperature checks entering restaurants, malls and hotels. Face masks the norm, meticulous cleaning in and around hotel @DoubleTree, feels so much more hygiene aware than UK. Well done #antalya #turkey"

"They're not taking any chances at the @TheAthenaeum. This curious device sucks out all the oxygen from a room, killing viruses (because, er, science). If you're in the room at the same time, it will kill you too, apparently! They use it before new guests arrive."

"Every guest is given a welcome pack with mask, hand sanitiser, gloves and more. Welcome to the new normal."

"We've survived the traffic and arrived at our somerset treehouse!!! This is ideal for lockdown. Check-in just involves parking the car and follow the signs..."

"#CrownePlaza just had the most wonderful stay at Crowne Plaza hotel Birmingham. Such wonderful, helpful staff. Definitely recommend to stay there for a post lockdown treat!"

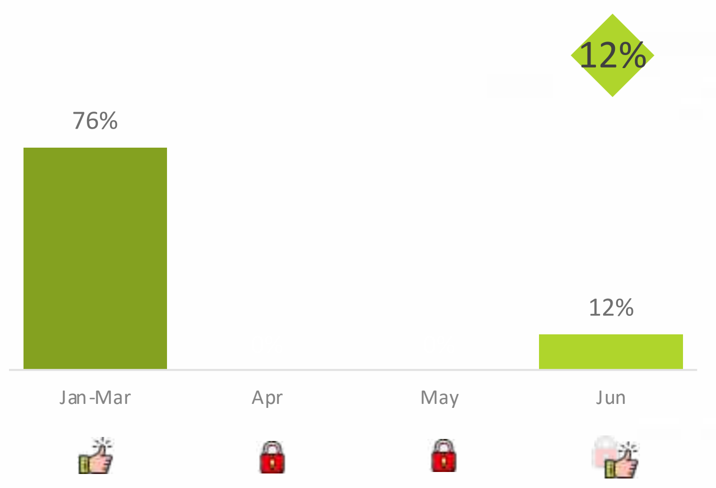
"My room @clivedenhouse- what's changed post lockdown? Room service is left outside your door and you are shown the bill - but you don't need to sign for it. The room is fogged (deep steam cleaned) after each visitor. @TelegraphTravel #greatescape"

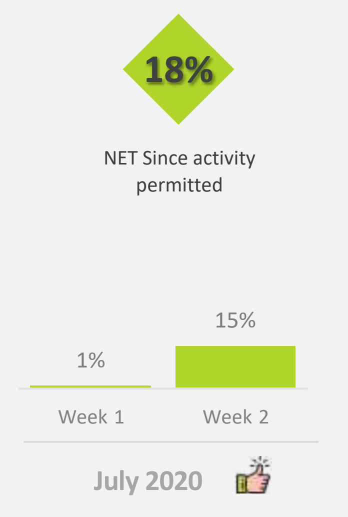
Market Recovery Tracking: Go on a shopping trip / to a shopping mall

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

Consumer comfort in going shopping continues to increase, with 35% planning to go on a shopping trip/to a shopping mall by July, the highest proportion seen in the last two months. The recent announcement of the compulsory wearing of face masks in shops in England could improve consumers’ level of confidence about shopping, but it may also detract from the experience so its impact on future intentions is not yet clear

Gone on a shopping trip / to a shopping mall since permitted





This week

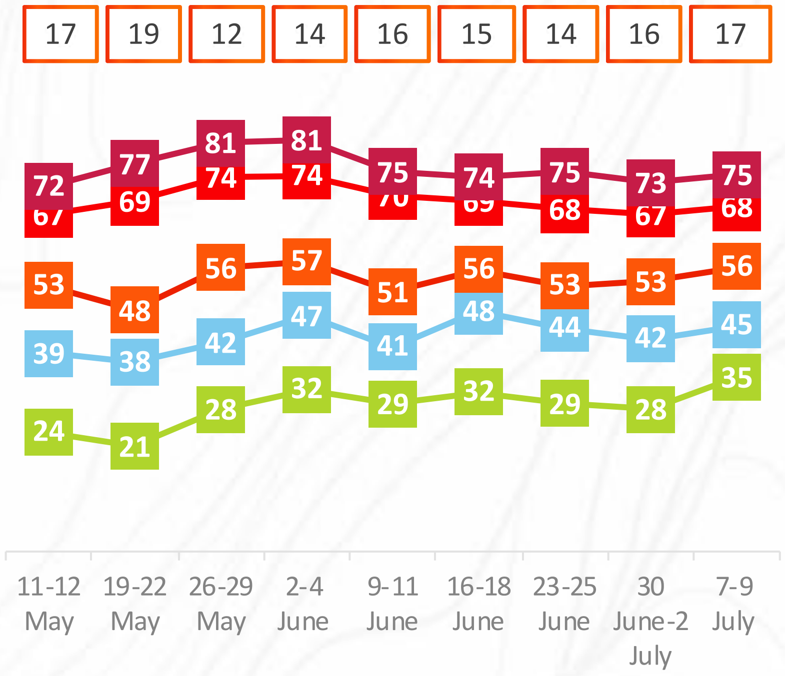
4.1

Average time **since** the activity last done

2.0

Average time **before** the activity next done

When the activity will next be done



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

% NET participation since pandemic / activity permitted
Activity is not permitted
Activity is permitted

Q12. Given what you know today, when do you anticipate doing the following? Base all
Q1a. And when exactly was the last time you did the following activity/activities?

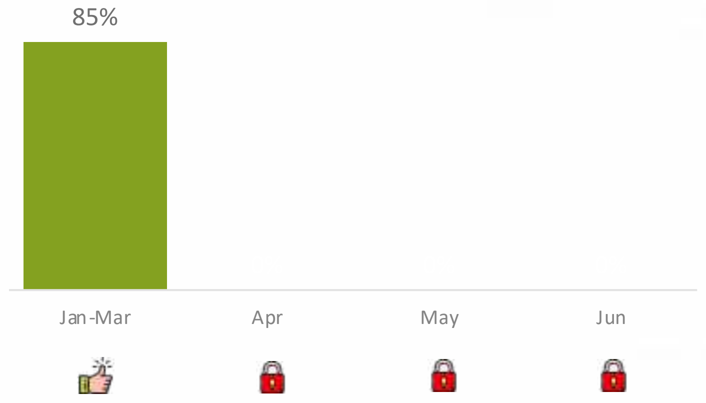
ALLIGATOR BVA BDRC

Market Recovery Tracking: Go to a restaurant

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

Since their doors reopened on 4th July we have seen 6% of our activists go to a restaurant. However the proportion planning to do so (again) by end of August has declined. It would seem the ‘eat out to help out’ scheme will be most timely to build confidence in this sector.

Gone to a restaurant since permitted



This week

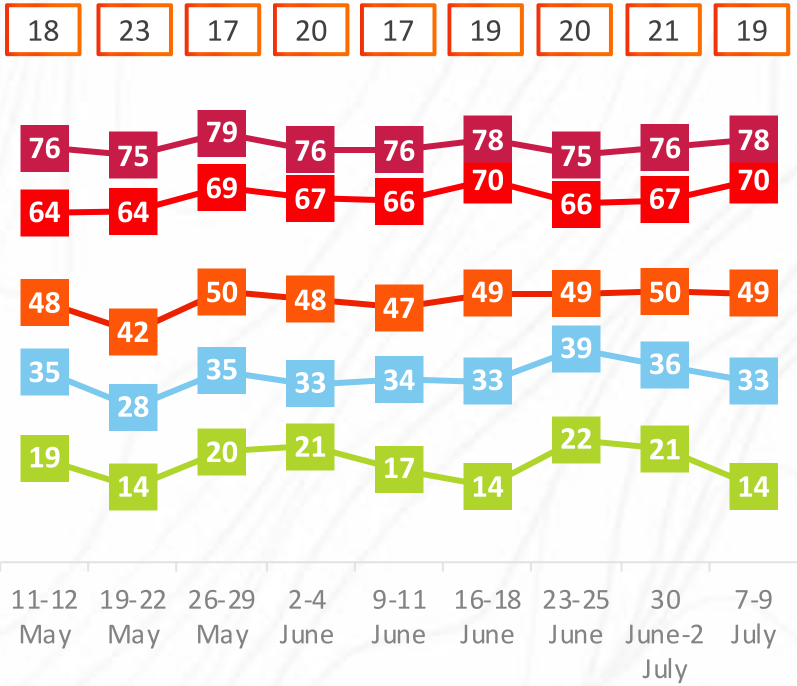
4.4

Average time **since** the activity last done

2.2

Average time **before** the activity next done

When the activity will next be done



NET participation since pandemic / activity permitted

Activity is not permitted

Activity is permitted

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

Q12. Given what you know today, when do you anticipate doing the following? Base all
Q1a. And when exactly was the last time you did the following activity/activities?

ALLIGATOR BVA BDRC

On social media – Many reported safe and enjoyable experiences after the reopening of pubs and restaurants. The new safety systems implemented were praised by many. Other experiences weren't as enjoyable, with complaints about the unsociable and rushed atmosphere, as well as some customers not observing social distancing measures.

"Welcomed to foggy Cornwall with a table service pint at the St Buryan Inn. First indoor pint in months - and excellent social distancing going on in here."

"Guilty confession: we went out last night. Not to a pub, to a restaurant where bookings were strictly limited, tables were well spaced and a one way system was in place. Everyone was very sensible and we all had a bloody lovely steak dinner. Normality is possible."

"First meal out now we can; staff word masks (not visors) and hand sanitiser was everywhere. We booked and ordered in advance. Staff would usually stand n chat to us at table but just brought our meals and kept distance otherwise. Had to write our details down (track n trace)"

"First meal out since March - we chose the Hungry Mexican! Was really impressed by the restaurant set up, socially distanced tables & all staff were wearing masks / politely keeping their distance. Stay local if you can @RAI_ie #Covid19 #Recovery"

"After months of lockdown we get our first opportunity to dine out and it didn't disappoint! 👌🏼 @MillerandCarter"

"First visit to the pub & didn't enjoy it at all..... these guys have such a hard task ahead rebuilding a new kind of business. Very cold, unsociable atmosphere, sat there trying to think what I would do if this was my business? I think people have got used to being at home"

"It sounds so pathetic but having my first meal out in 15 weeks today has taken my lockdown mood from like a 3 to a 10."

"Back to work today at a beachside restaurant in Swanage, UK: out of the hundreds of customers we had, I saw only two people wearing masks. Only two out of HUNDREDS! There was no social distancing with anyone, including my own work colleagues. I honestly feel like quitting."

"Just went for a meal. 105 mins to the minute. Felt very rushed. Was actually terrible experience. I won't be hurrying back."

"1st day of opening after Covid 19 Harvester UK restaurant still unclean in mens toilet .. under the hand drier .. Haywards Heath . #HarvesterUK #COVID19"

"Even tho we didn't eat at the Yo!Sushi restaurant yesterday I would feel safe eating there with there BBC News - Coronavirus: Yo! Sushi adapts conveyor belt system"

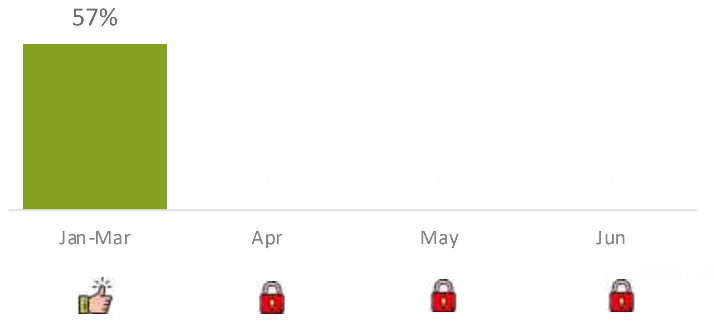
"The Waggon n Horses (The Wag) on Surbiton Hill Rd is a great local pub and has a fantastic beer garden, so happy it's open again....all very safe n sensible."

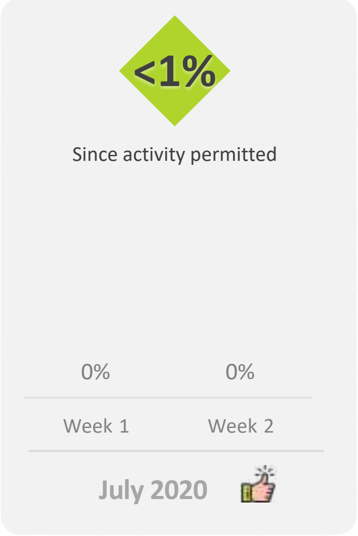
Market Recovery Tracking: Go to the cinema

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

The proportion of people who are planning to visit a cinema by August 2020 remained relatively steady despite cinemas across England have been allowed to be open since July 4th, and cinemas across Wales and Scotland being allowed to re-open in the next few weeks. This lack of movement in intention levels could be due to general unease about visiting the cinema or the fact that the release dates of blockbuster movies have been pushed back.

Gone to the cinema since permitted





This week

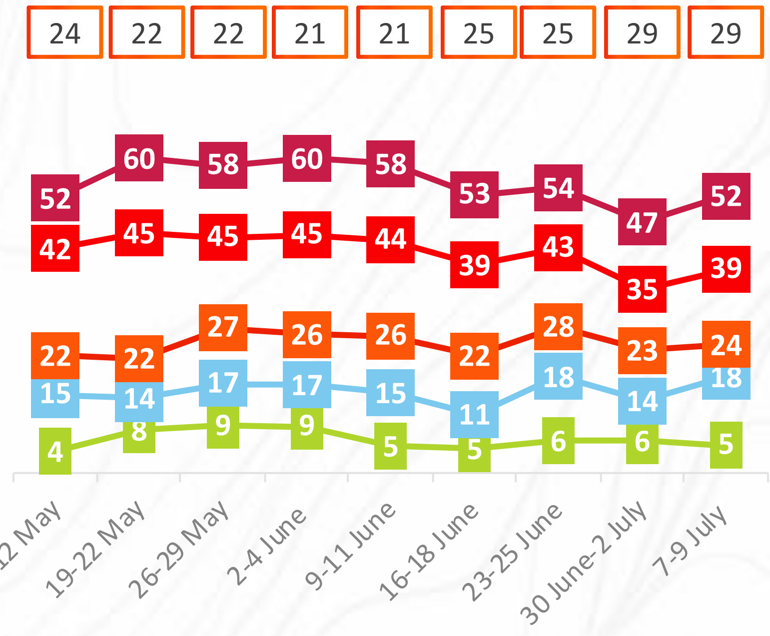
5.7

Average time **since** the activity last done

3.8

Average time **before** the activity next done

When the activity will next be done



NET participation since pandemic / activity permitted

Activity is not permitted

Activity is permitted

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

Q12. Given what you know today, when do you anticipate doing the following? Base all
Q1a. And when exactly was the last time you did the following activity/activities?

ALLIGATOR

BVA BDRC

Market Recovery Tracking: Go to the gym

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

Despite the reopening of gyms being just around the corner there is still caution among the gym bunnies, with little change in those planning to use them soon and an increase in thise unsure as to when they will return. It would seem consumer levels of comfort in using such facilities is not particularly strong.

Gone to the gym since permitted

NET participation since pandemic / activity permitted

Activity is not permitted

Activity is permitted

This week

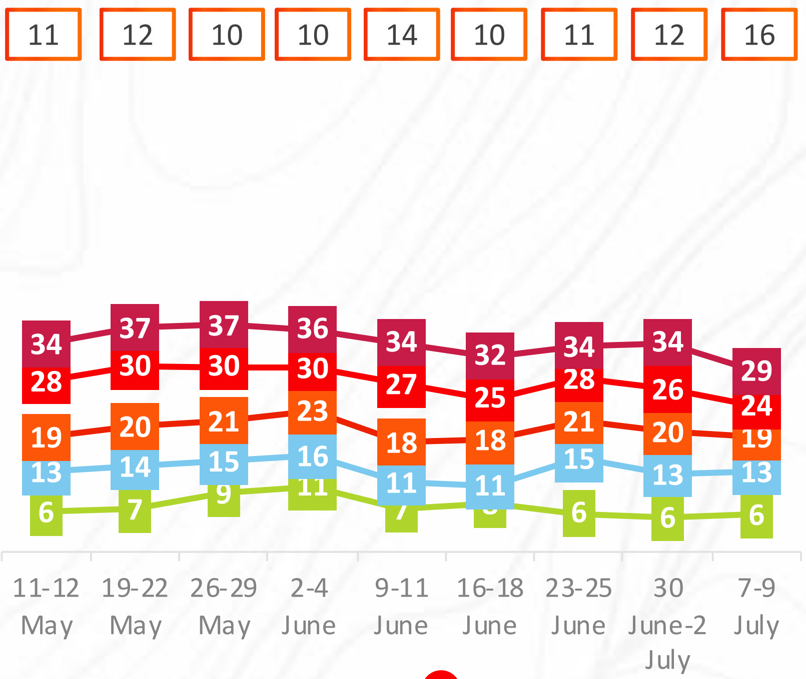
5.5

Average time **since** the activity last done

2.9

Average time **before** the activity next done

When the activity will next be done



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

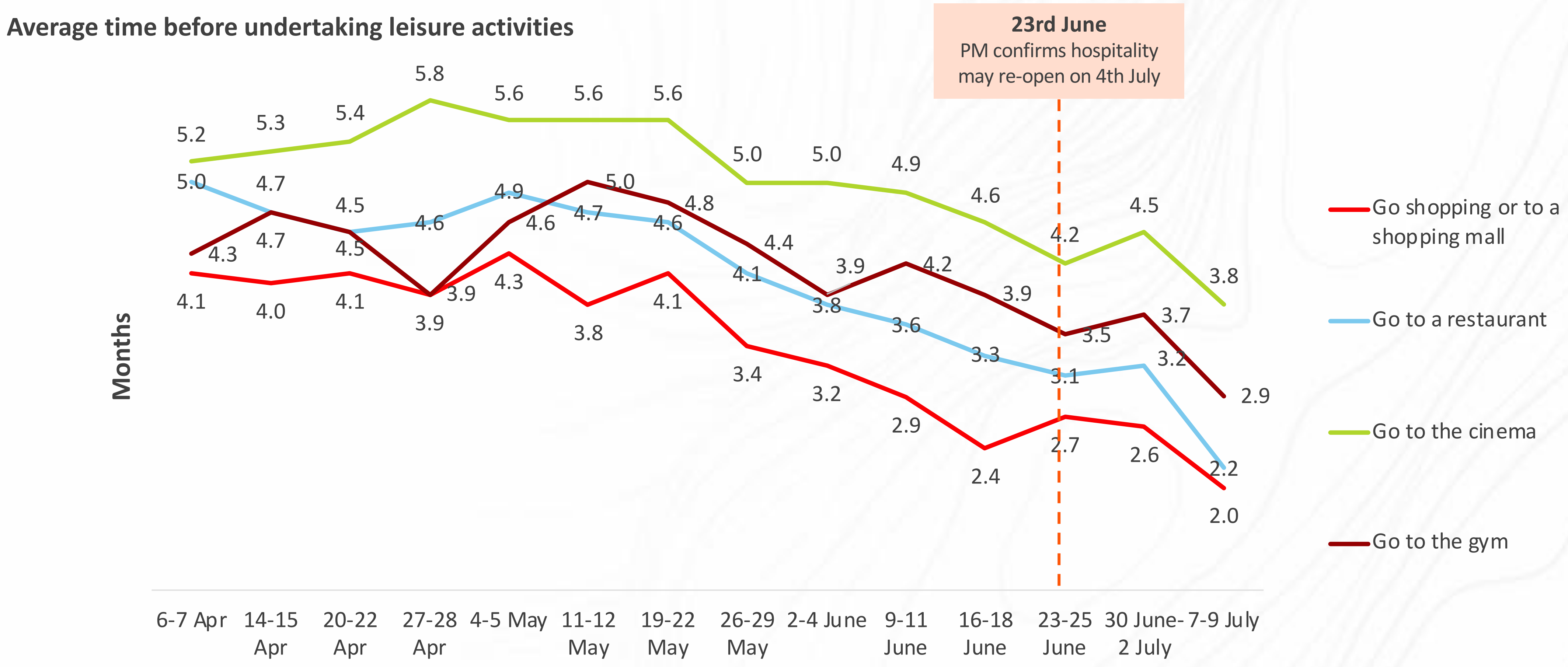
By end of August 2020

By end of July 2020

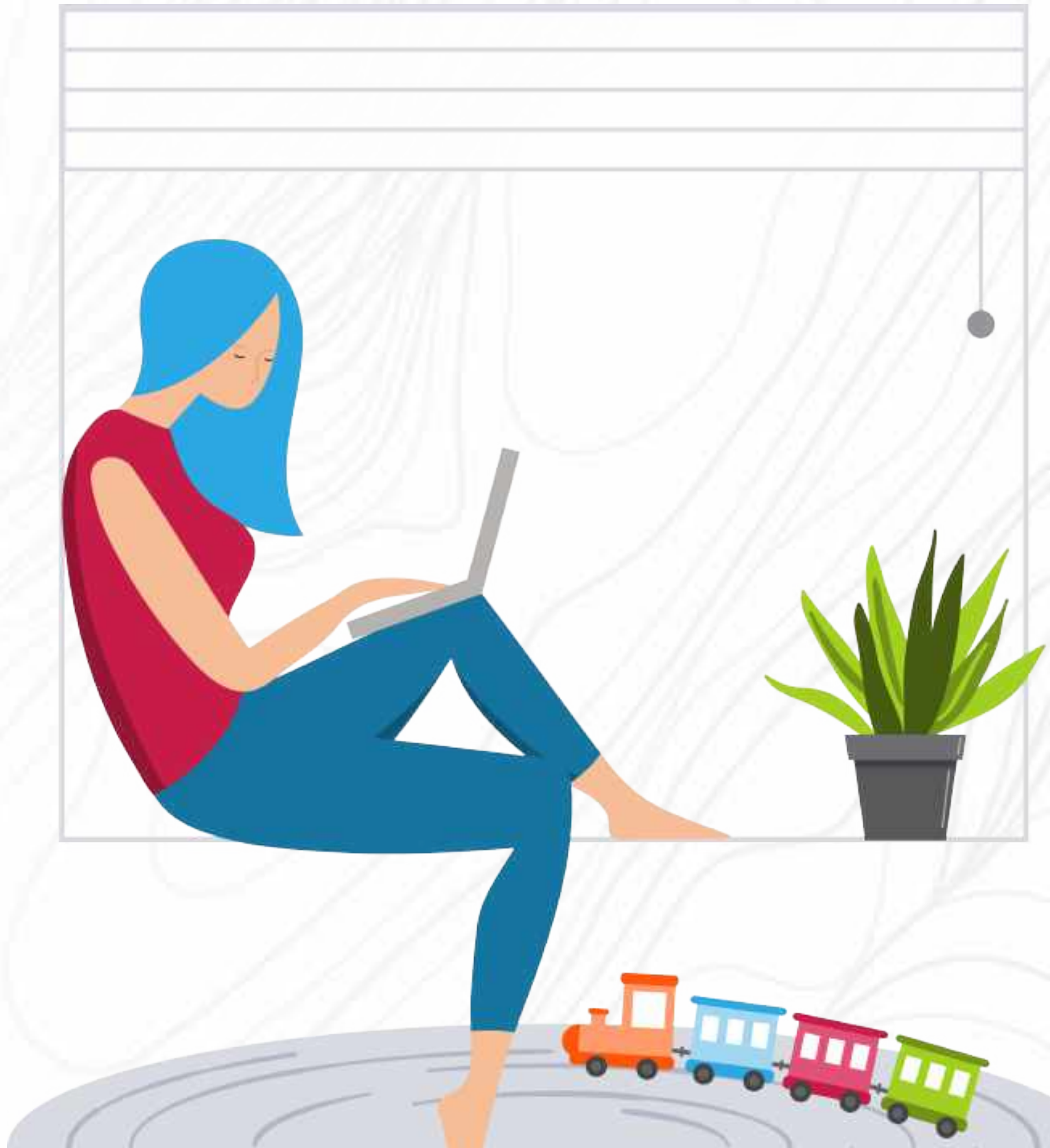
Q12. Given what you know today, when do you anticipate doing the following? Base all
Q1a. And when exactly was the last time you did the following activity/activities?

ALLIGATOR BVA BDRC

That the lead time for going to a shop, restaurant, cinema or gym among those who want to do each activity has shortened is an encouraging sign



Transport

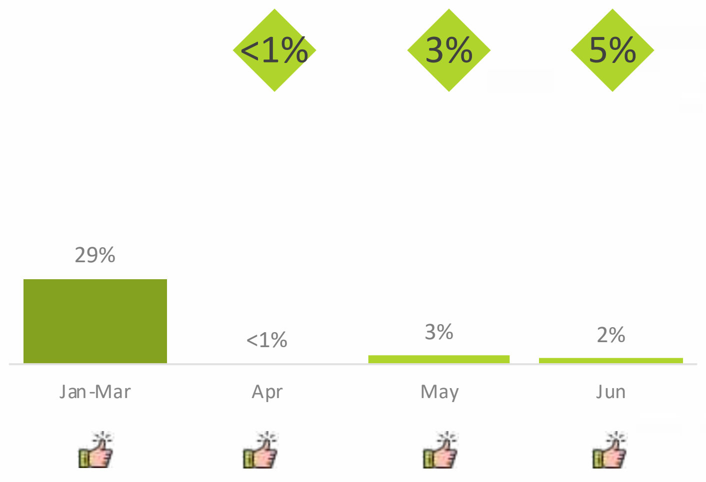


Market Recovery Tracking: Book a flight

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

As more and more airlines have resumed flights and beefed up their schedules since the beginning of July, lead time recedes again and the accumulative share of those who have booked a flight since April continues to grow. But at fewer than 1 in 10 numbers are still modest and the proportion of those who intend to book by the end of the year remains at around a quarter.

Have done the activity since permitted



This week

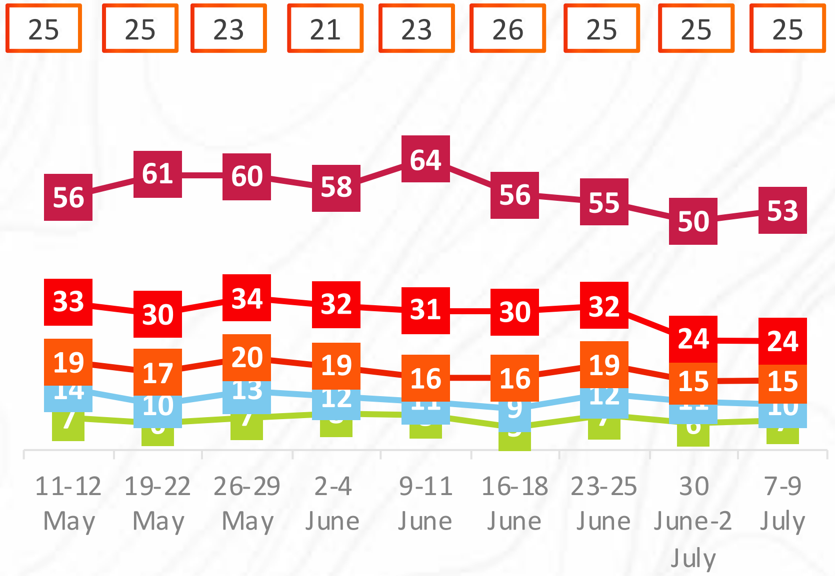
6.8

Average time **since** the activity last done

5.6

Average time **before** the activity next done

When the activity will be next done



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

% NET participation since pandemic / activity permitted
Activity is not permitted
Activity is permitted

Q12. Given what you know today, when do you anticipate doing the following? Base all
Q1a. And when exactly was the last time you did the following activity/activities?

ALLIGATOR
BVA BDRC

On social media – Customer service from airlines and travel agencies come under criticism as cancelled and rebooked flights generate confusion and frustration amongst the public

"I have booked a holiday to Bulgaria with @sunshine_co_uk however the flights are with Balkan. Does this mean my holiday has now been cancelled? I contacted @sunshine_co_uk and they advised you have only cancelled your flights until 15th July. Can someone advise me what's going on"

"@Opodo_UK my **flight** from the U.K. has been **cancelled**! I would like to cancel my car booking. I have tried on manage my booking and it won't allow me because you want me to reconsider. The trip isn't going ahead there's nothing to consider. Please cancel."

"@KLM_UK why are you refusing to refund me for my **flight** which you **cancelled**? Thanks for offering a voucher but I want my money back. I've tried for days to speak to a human being on the phone but you seem to only employ robots. Anyone else experienced this? #KLM #Corona #Tavel"

"@British_Airways I love that BA have **cancelled** our **flights** for 3/21 from **UK** - Philly. But it's ok, cause they've re-booked us on a new **flight** from Philly-Orlando. Cause that's the same thing! Now if only I can remember where I put my magic carpet to get us all to Philly!"

"@KLM_UK @airfrance convenient that all phones and emails are too busy to talk to me about getting a refund for my **flight** which you **cancelled** and re-booked without my consent and are now expecting me to have a 29 hour layover in Paris during a pandemic??"

"These airlines are crooks. Both @easyJet and @Ryanair have **cancelled** my **flights** leaving the **UK** in July but refuse to cancel the return legs."

"@Australia I have **flights** from **UK** to Perth via Singapore Air on 1st October. I hear Quantas has **cancelled flights** until late Oct, so are my **flights** likely to go ahead?"

"@British_Airways @MartinSLewis @UK_CAA @grantshapps Trying to use a BA voucher for a cancelled flight that BA forced us to take. Can't use it online and nobody answering phones! Please can we sort this out. #bacustomerservice #bafraud #britishairways #voucher #IAG"

"I can't get to Sweden for my holiday next week, my flight has been cancelled and the **UK** government is advising against all but essential travel. @ExpediaUK your agent has said the **hotel** won't **cancel** or change the dates - As my booking is with you, what are my options? Thanks!"

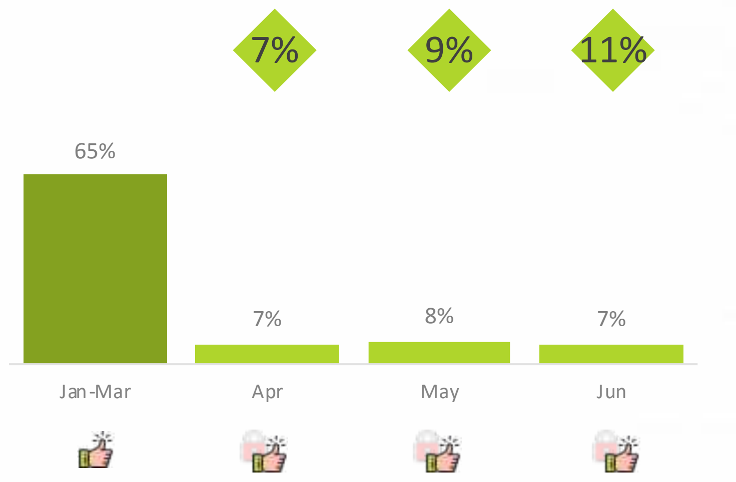
"@jet2tweets how can we be flying to Cyprus on 15th July when UK are a category C country till 1st August. your advice links on foreign office are contradicting and don't make sense . When are you going to confirm flights have been cancelled"

Market Recovery Tracking: Take the bus

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

With more people returning to what life used to be, bus usage has become increasingly common with almost one in ten taking a bus in the most recent week. Compared to other transport modes recovery in the bus sector is more prominent which is encouraging. Almost a third expect to take the bus by the end of next month, the highest proportion since early June.

Have done the activity since permitted



This week

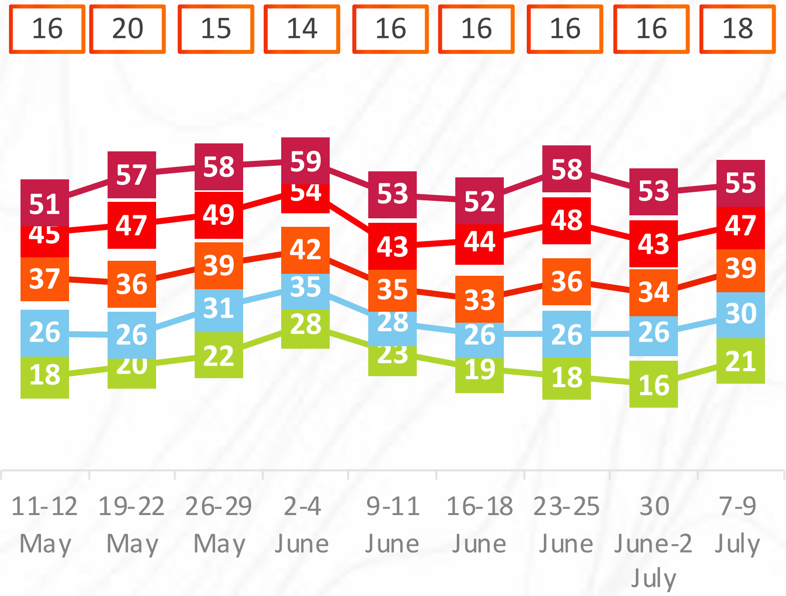
4.0

Average time **since** the activity last done

2.5

Average time **before** the activity next done

When the activity will be next done



% NET participation since pandemic / activity permitted

Activity is not permitted

Activity is permitted

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

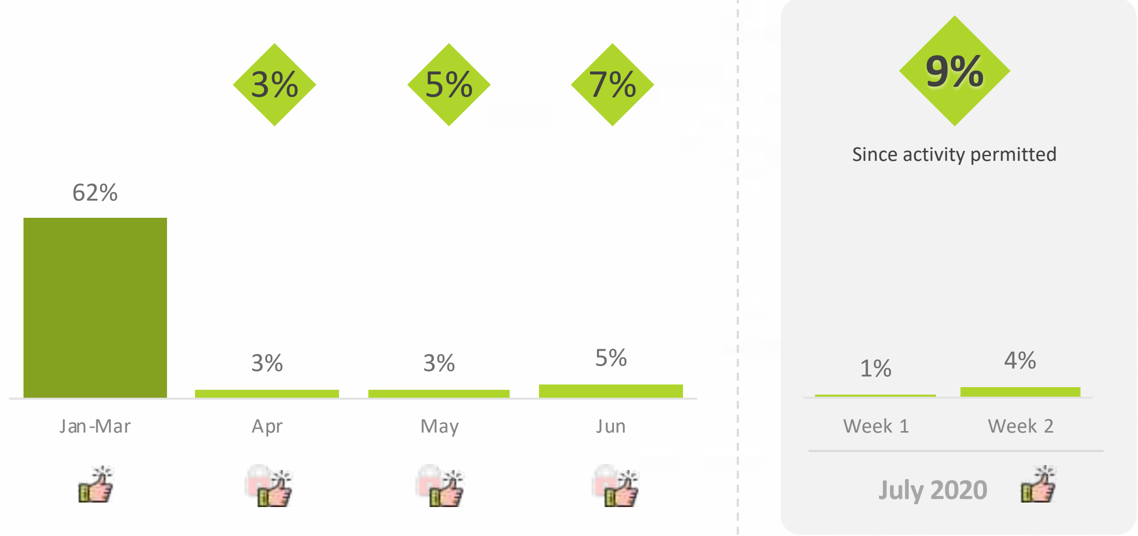
Q12. Given what you know today, when do you anticipate doing the following? Base all
Q1a. And when exactly was the last time you did the following activity/activities?

Market Recovery Tracking: Take the train

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

The rail sector has the biggest challenge to return to usage levels recorded pre-lockdown by travel activists (i.e. from 9% to 62%). Nevertheless usage sees further progress and interestingly intention to use the train continues to rise in the more immediate future (by end of July).

Have done the activity since permitted



This week

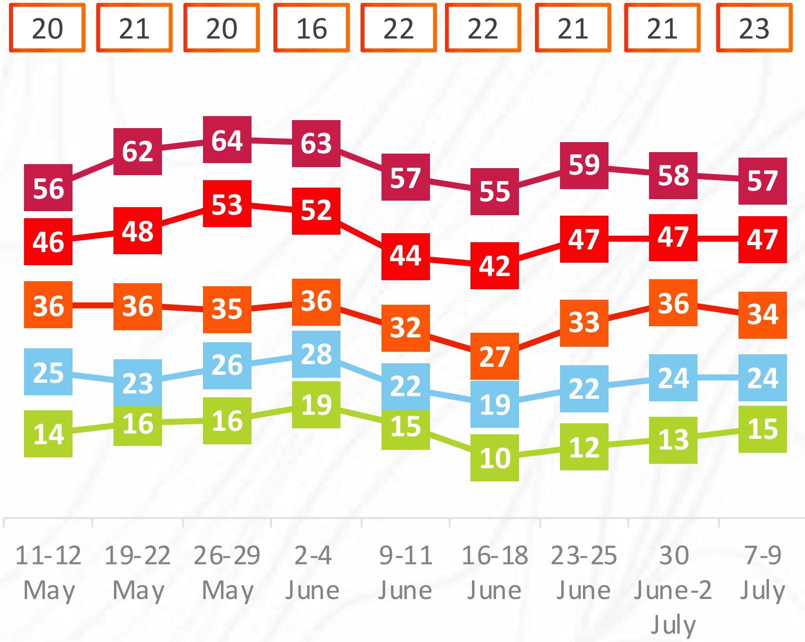
5.0

Average time **since** the activity last done

2.9

Average time **before** the activity next done

When the activity will be next done



% NET participation since pandemic / activity permitted

Activity is not permitted

Activity is permitted

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

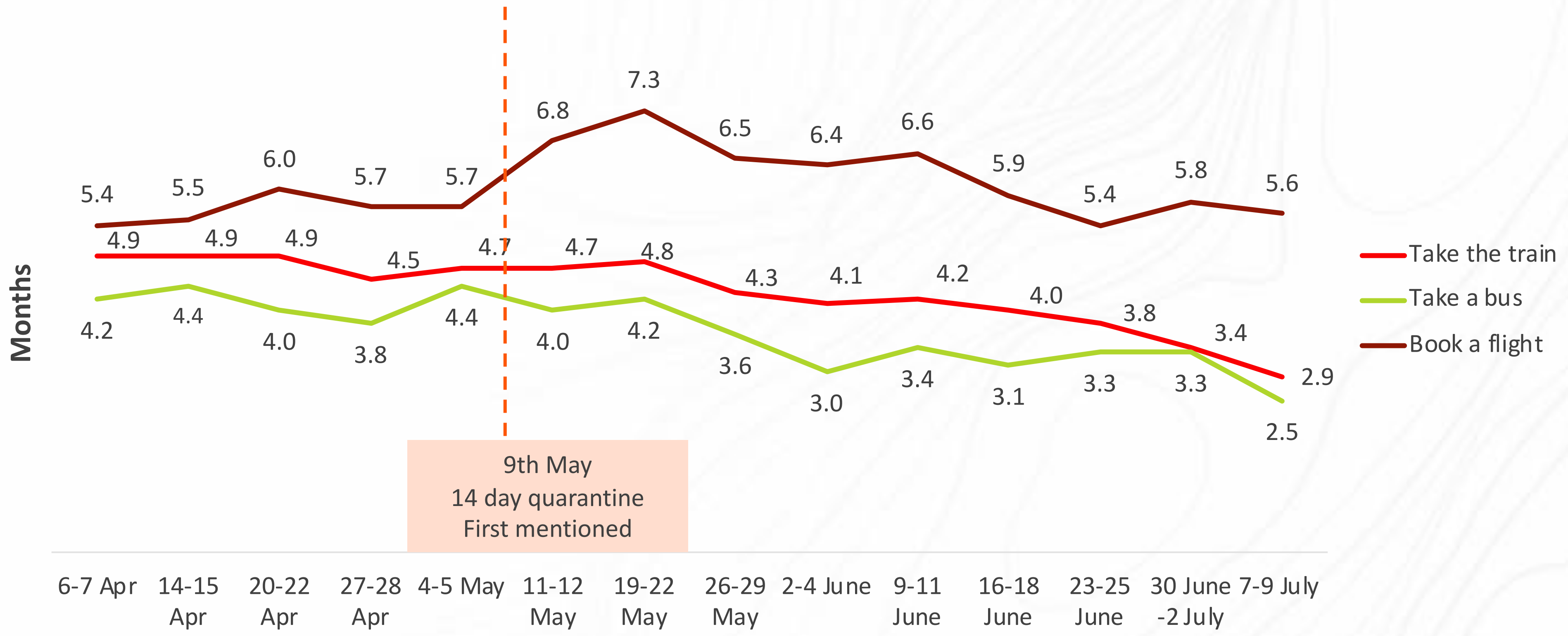
By end of July 2020

Q12. Given what you know today, when do you anticipate doing the following? Base all
Q1a. And when exactly was the last time you did the following activity/activities?

ALLIGATOR BVA BDRC

With the further ease of lockdown restrictions and people keen to get out, lead times for both rail and bus are at their lowest since first measured in April

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



On social media – As e-scooters are made legal to ride on roads in the UK, the public are torn in their opinions. Some approve, suggesting it is eco-friendly, allowing for social distancing. Others believe they are a hazard and will increase road accidents

"So electric scooters have been LEGALIZED to use in the road...BUT GET THIS...Only if you hire them? I mean how how bent does this government think it can be before we notice???#London"

"The new normal: COVID-19 masks and e-scooter bubble-wrap suits"

"@SkyNewsOn pavements... this is a mental decision I was hit from behind by a cyclist who took to the pavement to jump a red light and shattered my hip left with a life changing injury, this will lead to pedestrian injuries I hope they have to be insured!!!"

"Please Uk govt. Can we have electric scooters for everyone?"

"Scooters now legal in the UK. London launch expected in the near future. The hesitancy cities once felt toward micromobility is fading away as they come to grips with the urgency around avoiding carmeggedon and and need for providing low-cost, sustainable options during COVID."

"Brilliant. Be even better when private ones are legal. It's going to help empty the roads help the environment, and make the journey to work a bit of fun. The plan is that they eventually will have the same classification as e-bikes"

"Green light ahead for Rental #e-scooters here in the UK from this weekend! #micromobility #transport #futuremobility https://lnkd.in/g-nzJvv #ImprovingQualityofLife"

"Cunning way to replace COVID as the UK's biggest killer #escooters"

"Safe -segregated- bike corridors should be created in all main streets with several bus lines, so that bikes and scooters can become a safe alternative to public transport. This Covid-safe AND eco-friendly solution is not the one that will be chosen, obviously; but it should."

"God forbid the amount of accidents that could happen with people crawling around at 15mph on scooters they can't rid with a crappy helmet in tshirt and shorts not adhering to highway code"

"E-scooters will help with socially distanced and greener travel, how else can we restructure our cities as we recover from #Covid?"

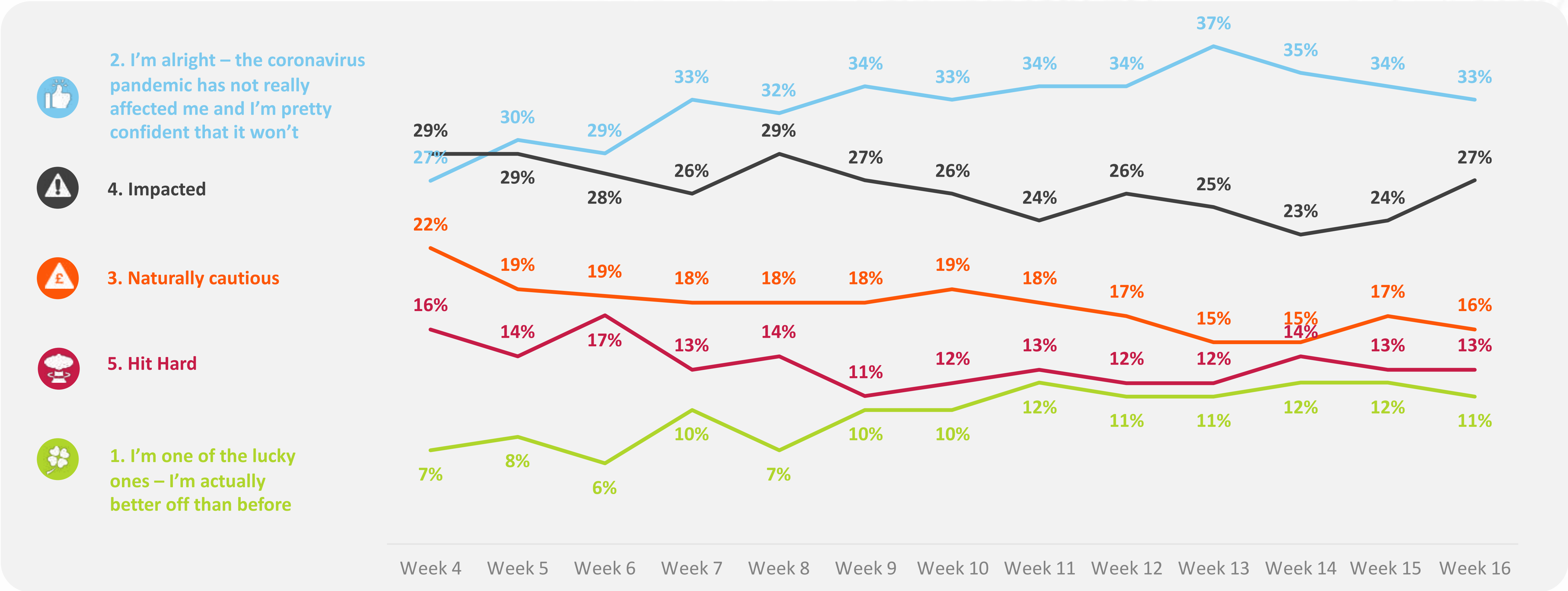
"This government's decision is ludicrous, at a time when public transport needs all the help it can get to recover from Covid-19. They've completely lost the plot. Public transport IS safe."

"@SkyNews Been riding one for the last 6 months! Saves me £45 a month not paying for public transport & cuts my commute from 45 mins to 15 mins 👍 #escooter"

Personal finances

UK adults are increasingly likely to feel financially ‘impacted’ by the pandemic

The increase in ‘impacted’ appears linked to the decline in people reporting that Covid has not really affected them.

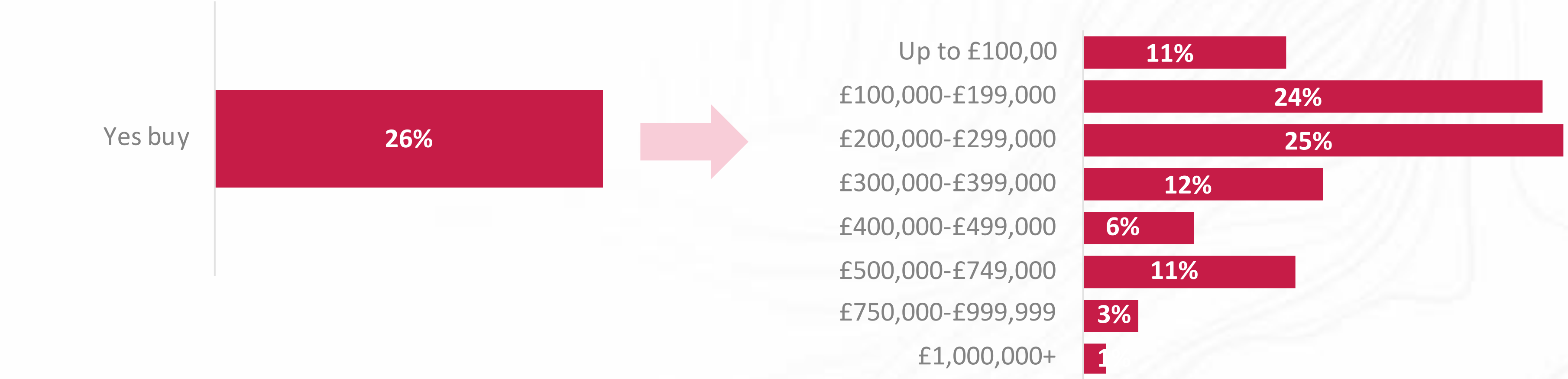


1 in 4 claim they are in the market to purchase a property

With data collected prior to the recent announcement regarding stamp duty taxes, this may now understate the level of property acquisition intent.
1 in 5 intend to sell a property, for an average of £2,000+ more than the average intended purchase price.
More important, from a market demand point of view there are more potential buyers than sellers.

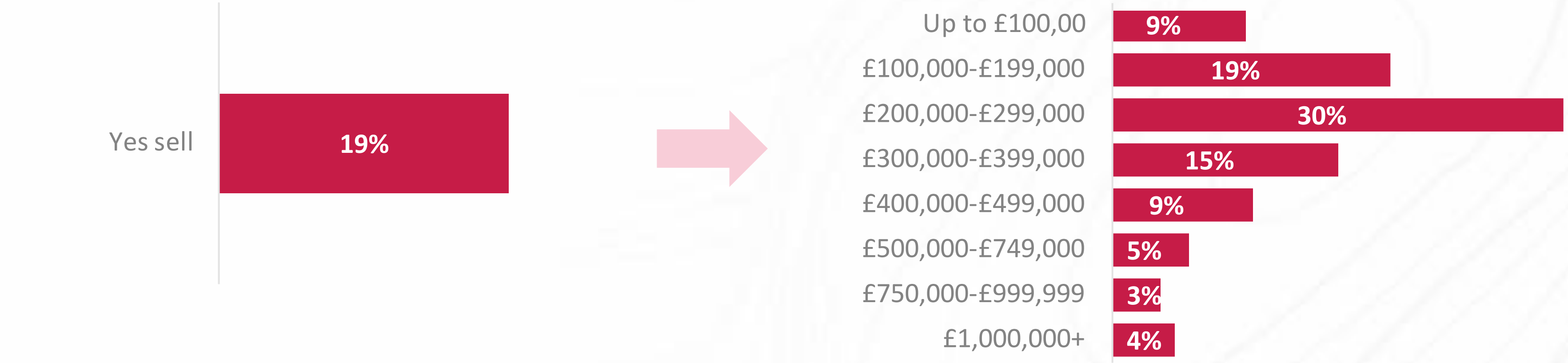
Planning to buy or sell a property (%):

For how much (%):



Average PURCHASE price

£277,417



Average SALE price

£279,812

Q1. Do you intend to buy and/or sell a property in the foreseeable future?
Q1A. How much do you aim to buy/sell your property for?

ALLIGATOR BVA BDRC

7 in 10 have a major purchase on their shopping list

Last week, we looked at longer term financial goals. This week we asked which, if any, significant purchases consumers have planned for the next 2 years. 7 in 10 selected at least one item from the list, with a holiday abroad topping the list. Elsewhere, tech or white goods or a new vehicle are on the shopping list for over 25%.

Planned purchases in next 2 years (%)

Observations:

- Half of those planning a foreign holiday will pay for it using cash in the bank
- Consumers will be similarly reliant on their current accounts to fund their technology/ white-goods purchases
- Instant savings accounts will be most commonly used for weddings, holidays and domestic goods
- Credit becomes more prevalent to fund jewellery, furniture, season tickets and technology

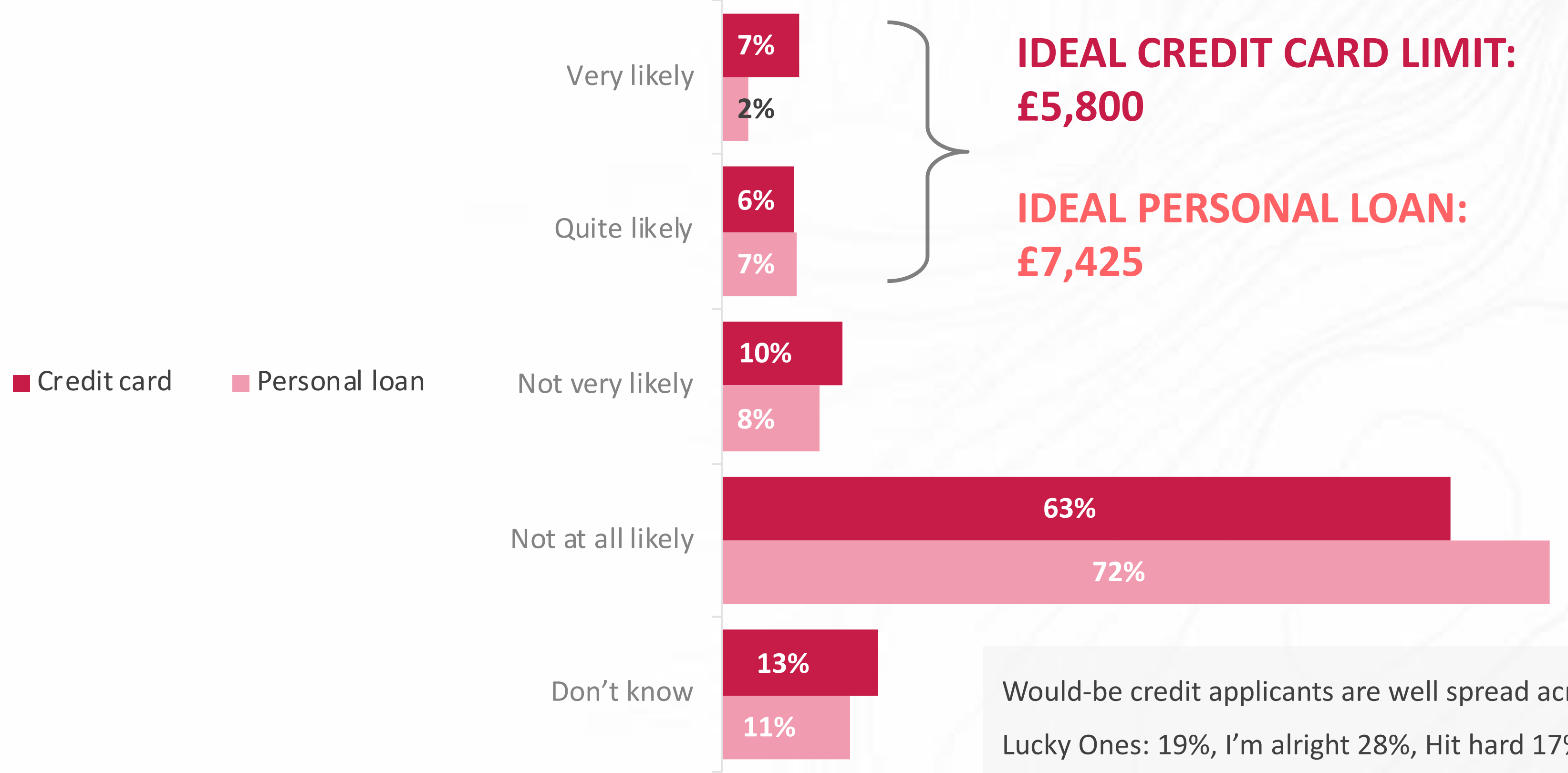
Q2. Which, if any, of the following significant purchases do you intend to make in the next couple of years?

ALLIGATOR BVA BDRC

Consumer appetite for new credit lines is moderate

15% plan to apply for a new credit card in the next 12 months and 9% a new personal loan. Those looking for a new credit card have aspirations of receiving very high credit limits! Over 6 in 10 reject the idea of applying for either form of credit.

Planned credit applications in next 12 months (%)



IDEAL CREDIT CARD LIMIT: £5,800

IDEAL PERSONAL LOAN: £7,425

Observations:

- 43% have a specific purchase in mind for their credit application
- 40% need the credit line to help fund their everyday expenditure
- 35% want to increase the amount of funds they have available
- 10% will consolidate existing debts should their application be successful
- 43% of credit card applicants want to transfer an existing balance to their new card

Would-be credit applicants are well spread across the financial segments:

Lucky Ones: 19%, I'm alright 28%, Hit hard 17%, Naturally cautious 7%, Impacted 28%

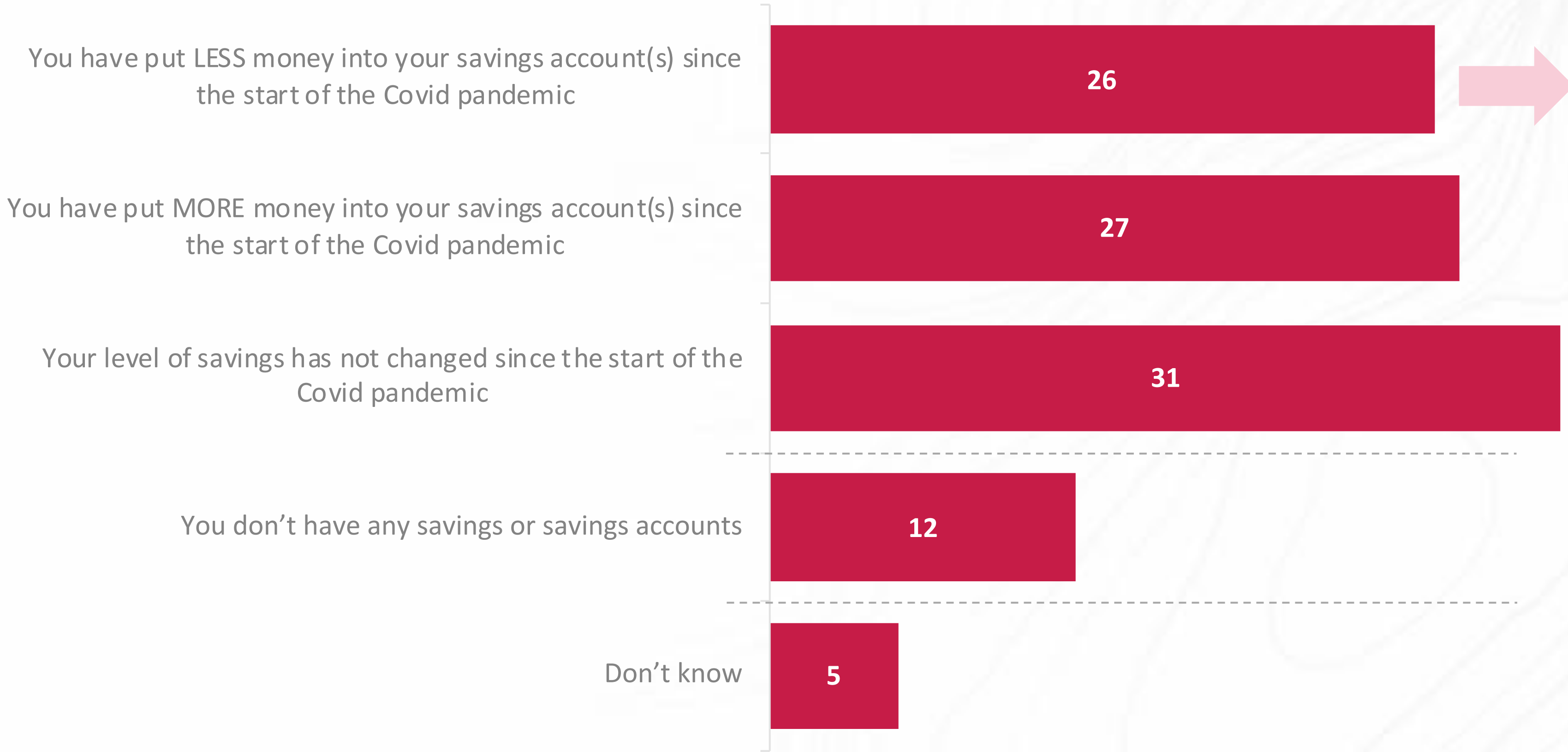
Q5. How likely are you to apply for a new credit card or personal loan in the next 12 months?
Q6. Ideally what level of credit are you aiming to apply for?

ALLIGATOR BVA BDRC

Savers are just as likely to have saved more as to have saved less during the pandemic (although we know total debt on credit cards has reduced significantly)

However, there are **significant differences** when behaviour is analysed by financial segment. Over 7 in 10 'lucky ones' have been able to save more, whereas over a half of 'hit hard' are saving less. For 3 in 10 consumers, savings behaviour is unchanged.

Savings behaviour during the pandemic (%)



Why have savings declined since the start of the pandemic?

- Less disposable income available: 52%
- Income has reduced/stopped: 42%*
- Interest rates too low to be worthwhile: 17%
- Saving elsewhere for better returns: (e.g. stocks/shares, property) 10%
- Other reason(s): 1%

*69% within the 'hit hard' segment

Q9. Thinking about your savings behaviour since the start of the Covid pandemic in late January this year, which, if any of the following best statements apply to you?
Q10. Why are you now saving less as the result of the pandemic?

ALLIGATOR BVA BDRC

On social media – Many are feeling a lack of support from their financial providers during the pandemic. Frustrations are rising as attempts are made to access savings accounts and gain approval for mortgages and loans. Customers turn to financial providers for answers as credit scores drop, with many assuming it is because they utilised the mortgage holidays offered.

"@LloydsBankNews Nothing to do with interest rates for them is it. 40% overdraft rate for borrowers & 0.10% for your loyal savings account customers. The morality of bankers leaves a lot to be desired."

"8 weeks now since I applied for a #bouncebackloans from @HSBC_UK and I'm still at the pre-application stage for the feeder account, which I need before I can apply for the loan! Not that I want a loan, but I'm #ExcludedUK so don't have a choice. Why so long???"

"@NatWest_Help Absolutely shameful disgusting bank, not extending you're already rip off 20% interest until October like all the other schemes have been, loan schemes, pension schemes, holiday, schemes, so in August you expect me to pay £100 a month in interest, NOT A CHANCE!!"

"@HSBC_UK @HSBCUKBusiness Our Company applied for a Bounce back loan on the 12th June and have received confirmation email but no correspondence since then. Our company is in financial difficulty! I thought this process was supposed to be quick and to help small businesses!"

"whats the best savings account to have for interest rates? Mine with Halifax is going down from a pathetic 0.2% to an even more pathetic 0.05% like what even is the point"

"@NatWestBusiness @NatWest_Help day 38~ no letter, no phone call, no communication. Holding MY savings of £60K while I struggle during a global pandemic with possible 2nd lockdown. 5 kids to feed, payments to make. But please sit and wait for a letter in due course. Brilliant."

"@itvMLshow I applied for 6 months free credit this week was turned down this has never happened before always had a good credit score . Is this because I took a mortgage break during covid"

"Halifax are saying (even with excellent credit score) I wont get a loan at this time, although all i am trying to do is get a loan for what already owe at a lower rate. The banks are using the fact that we have had mortgage holidays against us, bang out of order and against rules"

"Really disappointed with the slow response from @santanderuk over the response time for our #mortgage approval .. I thought @10DowningStreet wants to get the #uk economy moving again. Banks must speed up their processing time! We might lose our house sale over this."

"HSBC froze my credit card payments for 3 months and are marking my credit file with the missed payments. Recently declined my feeder account application too. My credit score will be in tatters after this."

Appendix

Methodology

Survey of Consumers

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

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

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

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

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


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


= 'All UK Adults' (nationally-representative)

Social media analytics

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

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

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

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

- 23,426 posts for the transport sector
- 22,715 posts from the leisure sector
- 16,398 posts from the hospitality sector
- 26,484 posts from the financial sector

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