Tracking Consumer Sentiment on the Impact of COVID-19

Travel & Mobility, Leisure & Hospitality,

Personal finances

Weekly Update – 29th July 2020

BVA BDRC ALLIGATOR

Introduction

In a week in which the UK government has come in for criticism from the Spanish Prime Minister for its imposition of a 14-day quarantine, our latest weekly bulletin underlines the plight of the international leisure and aviation sectors: as domestic travel and leisure verticals are showing encouraging signs of life, the outbound market remains well and truly in the doldrums.

Stung by criticism of its laissez-faire strategy both before and early in the crisis, the UK government now appears keen to show that it is willing to adopt a more interventionist approach. While face-coverings in shops and prolonged quarantine measures for international holidaymakers are unwelcome to some, for others, the smack of firm government provides reassurance – indeed, our latest data indicates a significant improvement in intentions for the retail sector in August and September.

For air travel, however, the blanket quarantine rule does feel like a blunt instrument. In the absence of a vaccine or another silver-bullet to beat the disease, there will surely be a growing clamour for preventative measures which have the desirable dual effect of reassuring would-be travellers (and thus boosting passenger volumes / ticket sales), while also protecting public health. This means more testing – though testing prior to departure and making the right to travel contingent upon being 'COVID negative' would doubtless offer more reassurance than doing so at point of arrival.

Notwithstanding the severe headwinds for aviation and outbound travel, this week's report is the most upbeat for quite a while. The widely anticipated staycation boom seems closer to materialising in practice, engagement with visitor attractions (though obviously still well below 'normal' levels) is recovering week-on-week (with much more positive intentions for the remainder of the summer holiday period), while eating out and retail both pick up momentum.

Running in parallel with these welcome changes in consumer behaviour and intentions, through our attitudinal segmentation, we observe consumers gradually moving out of the most anxious / cautious segments, with our 'Life Goes On' segment the biggest grower. Understanding the profile and attitudes of these segments remains crucial to unlocking their potential value!

Stay tuned and stay safe!

Matt Costin
Managing Director, BVA BDRC

Suzy Hassan
Managing Director, Alligator Digital

Executive Summary

Positive signs on a range of sentiment indicators this week

While we are unable to report an improvement in national mood this week, in general, the ‘mood music’ is significantly more upbeat, with indications that the UK government’s moves to bring about a return to normality are starting to have some effect on our attitudes towards the crisis, as well as our engagement with sectors such as travel, leisure and retail. We will need to wait another week or two before being able to call this a turning point.

Positive early feedback from those who have ventured into restaurants and pubs

There is a significant week-on-week increase in the proportion of Travel Activists who have ventured into a pub or restaurant. Their feedback is much more positive than negative, mirroring anecdotal reports of operators going to considerable lengths to make guests feel safe and confident. However, on the ‘experience’ side of the equation, many customers remain in the ‘neutral’ rather than ‘positive’ camp, suggesting that the industry must work hard to avoid diluting the customer experience while enforcing the necessary restrictions.

Attractions record surge in visits (and planned visits)

In a very positive week for visitor attractions, we report a surge in Travel Activists who have now visited an attraction since the lifting of restrictions, coinciding with the start of school holidays. Encouragingly, future visit intentions also rise to their highest level yet for the summer holiday period, while the proportion who intend visiting before the end of 2020 also climbs to a new peak.

Significant week-on-week uplift in retail activity and intentions

As the data for this week’s report was being collected, the rule on face coverings in shops and enclosed public spaces in England was just coming into force. 1 in 4 Travel Activists have now visited a shopping mall or made a dedicated shopping trip since re-opening – still significantly lower than ‘normal’ participation levels, but the week-on-week growth in July is significant. Forward intentions for August and September climb to a new peak, indicating that while not everyone is happy with the mask ruling – overall, it may be helping rather than hindering prospects for the sector.

Aviation and international holidays still in the doldrums

Despite the encouraging signs of life elsewhere, the same cannot be said for aviation. Against a backdrop of new COVID outbreaks in key destination markets, tightening government quarantine restrictions and no real movement on the issue of testing in airports, there is virtually no week-on-week improvement in the proportion of travellers re-engaging with air travel and, looking ahead, flight booking intentions for August and September move in the wrong direction. Beyond air travel, the outlook for overseas holidays as a whole remains static.

Stamp duty holiday has encouraged many would-be home buyers to adapt their plans

Prior to the pandemic, 14% of the population (20% of ABC1s) originally planned to purchase a property in 2020/2021. Half of these would-be buyers are now reviewing and adapting their plans to capitalise upon the revised stamp duty threshold, including buying before the final deadline, reducing their borrowing or re-considering their budget – either expanding their horizons to include higher value options or ensuring that they remain within the £500K limit and pay no stamp duty at all.

Contents

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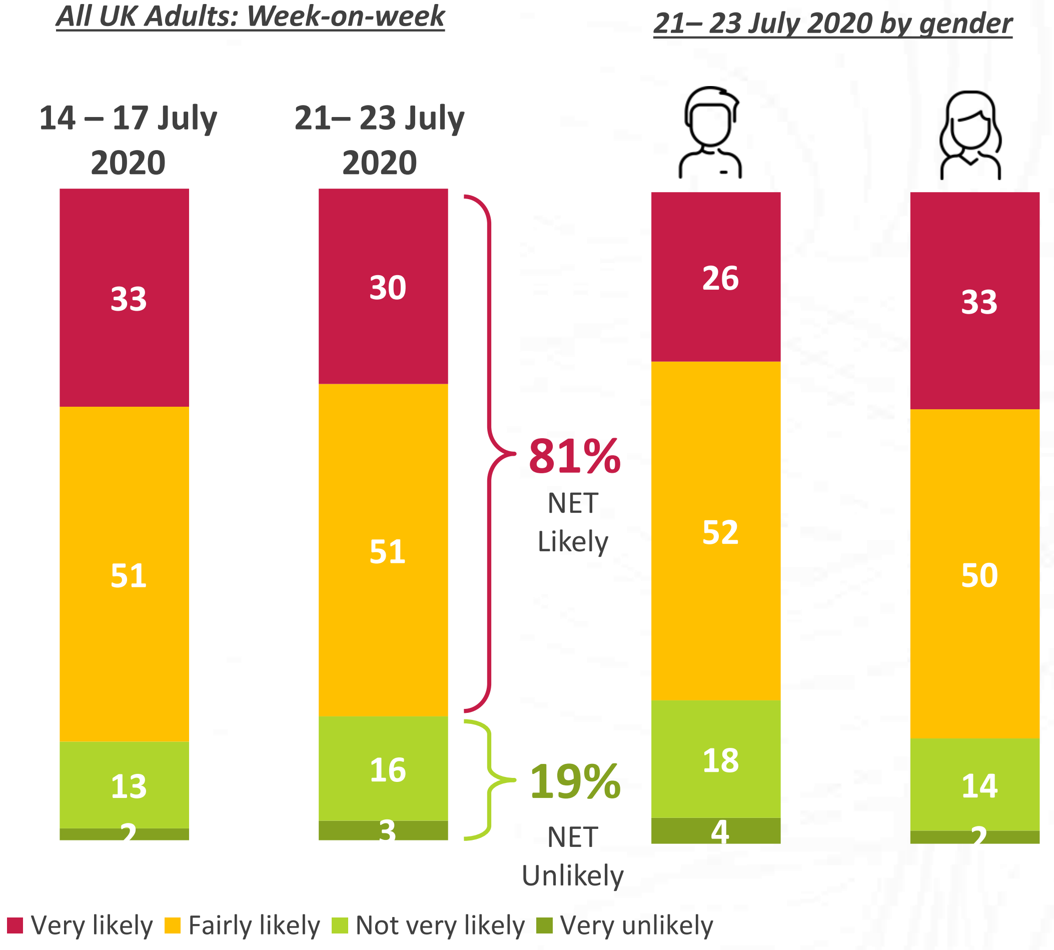
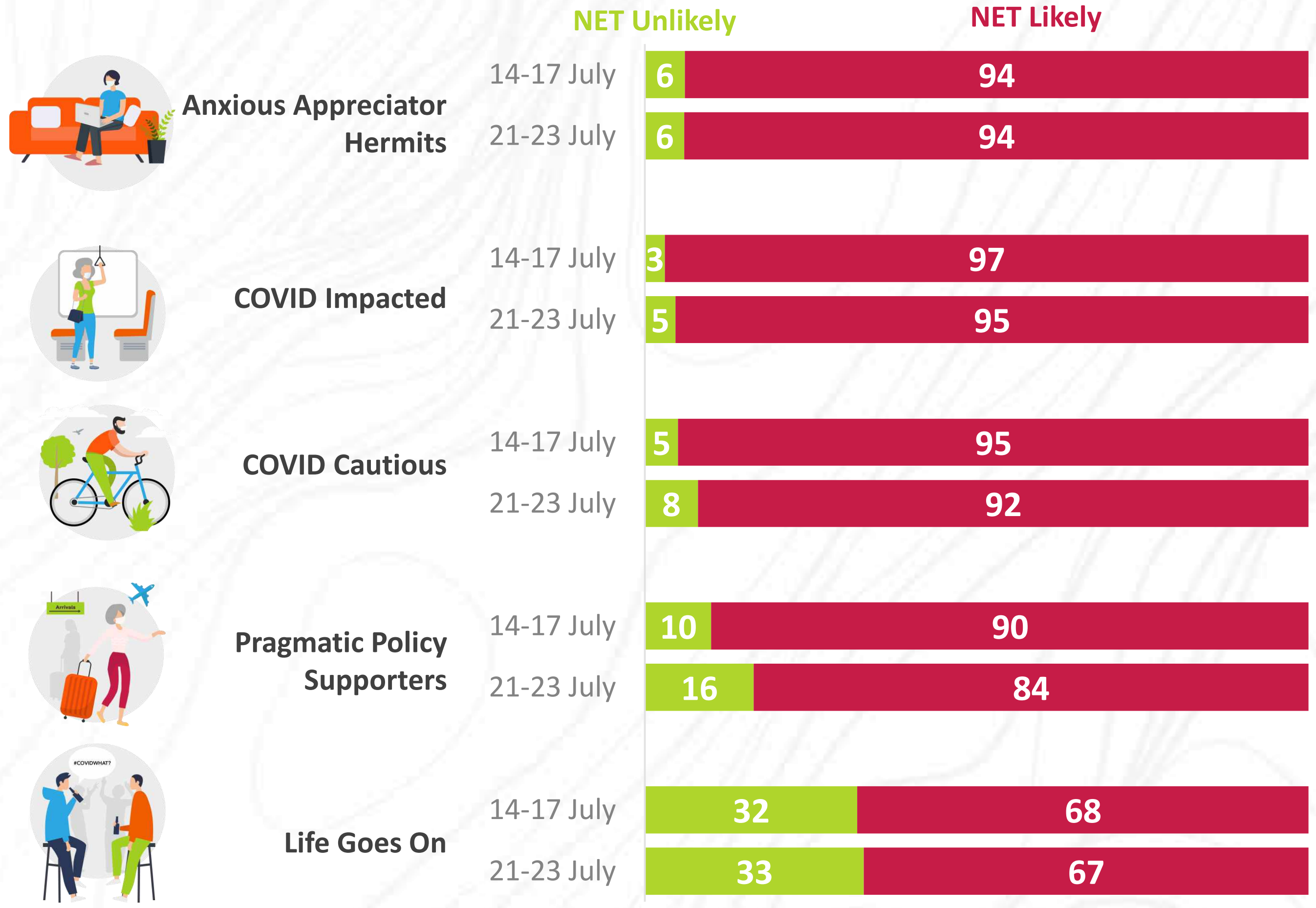
The mood of the nation

Fears of a 2nd wave remain widespread but recede slightly week-on-week. A higher proportion of women than men consider a 2nd wave 'very likely'.

Perceived likelihood of a second wave of coronavirus that will lead to a new lockdown





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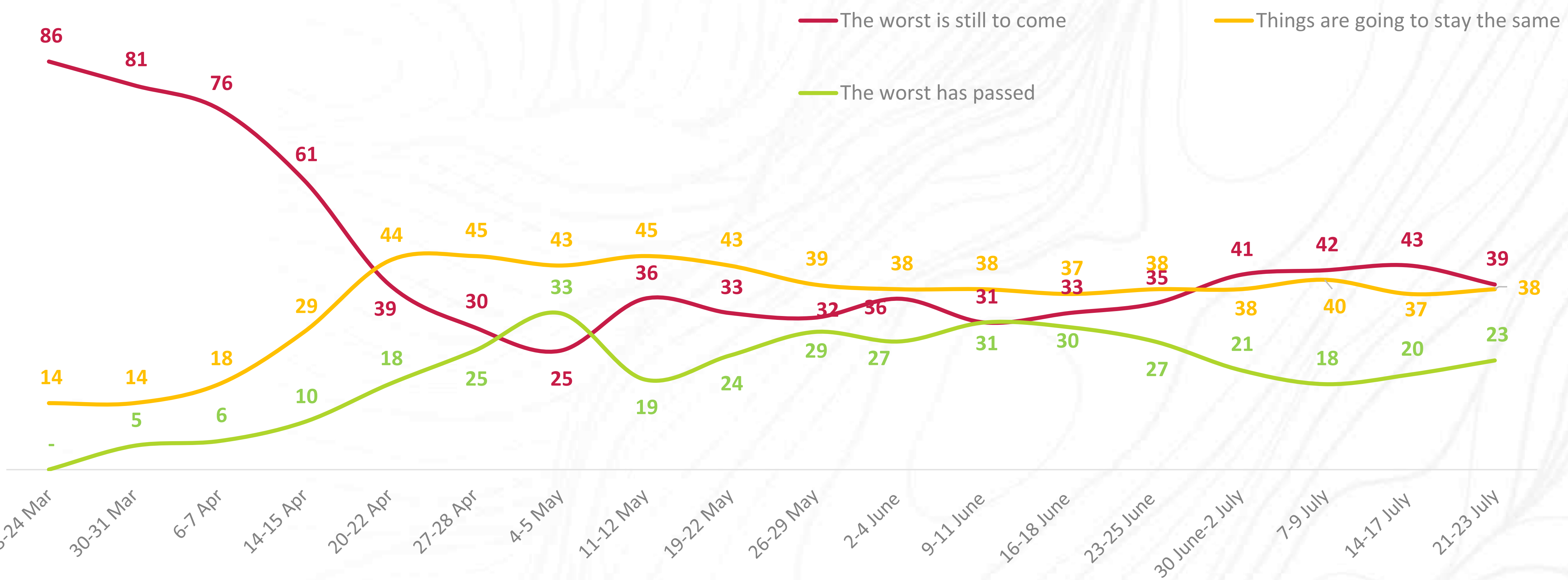
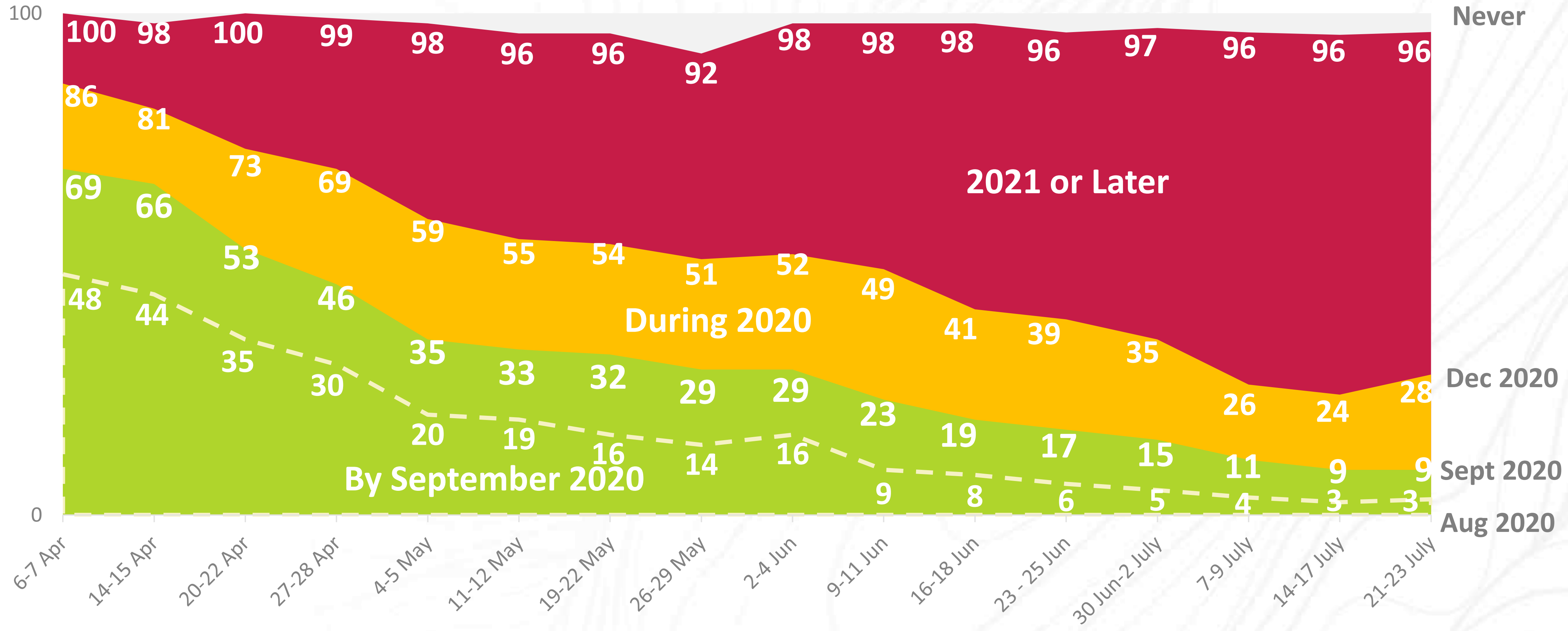
This week we report a reversal of the 7 week trend of more Brits fearing that the *worst is still to come*. There is also a second consecutive uplift in the proportion who believe the *worst has passed*.



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

Mirroring the trend on ‘worst is yet to come vs behind us’, for the first time in 7 weeks, there is growth in the proportion of adults who belief life will return to something close to normal by the end of 2020.

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



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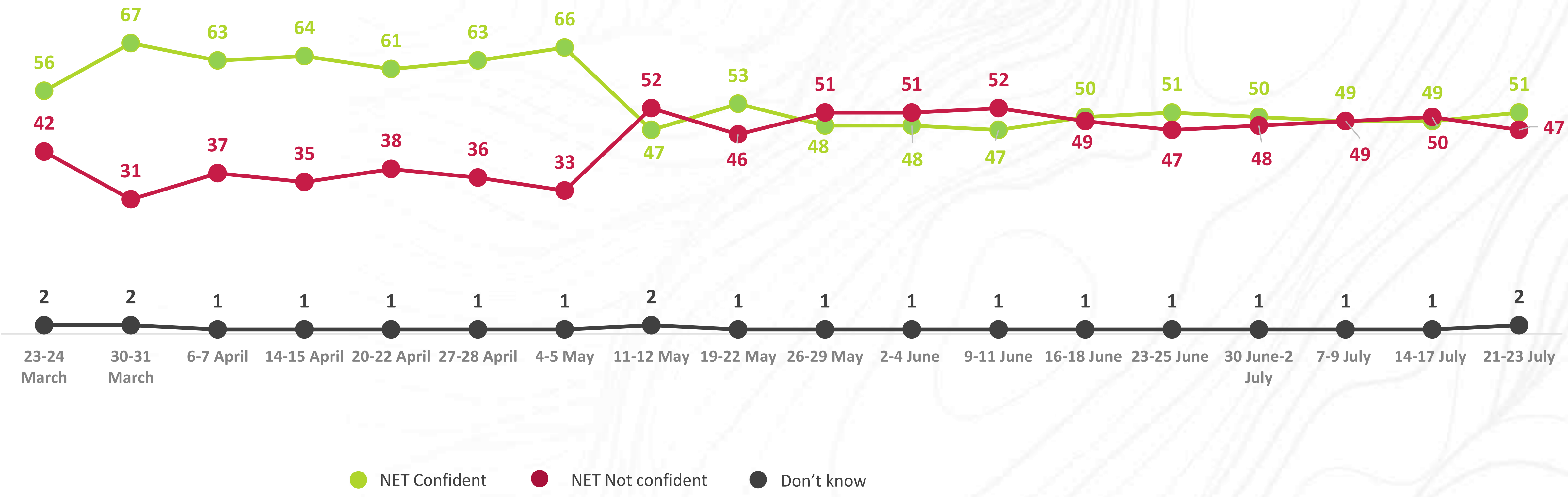
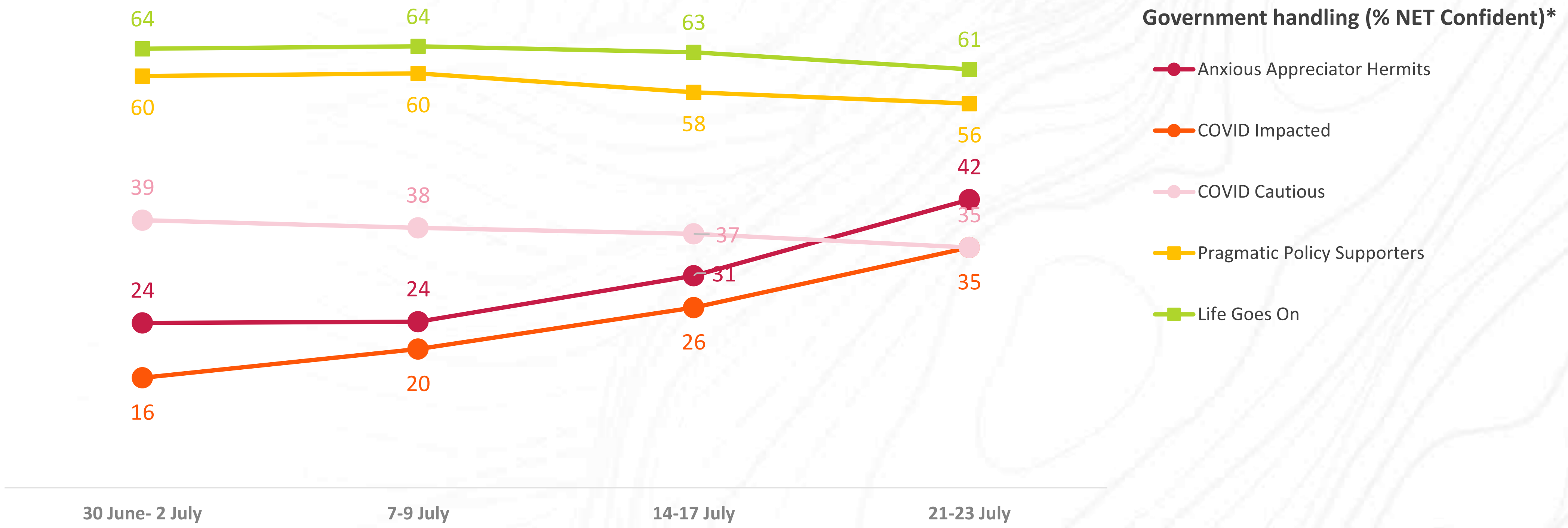
With a more interventionist stance evident on a range of COVID-related policy areas, confidence in the UK government increases slightly – though the country remains very evenly divided in its verdict.

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? (%)

A more assertive stance from the government in recent weeks on a range of issues (from masks in shops to international travel) appears to be reassuring the segments most concerned about the pandemic.



*Scores are based on rolling 2 weeks
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? (%)

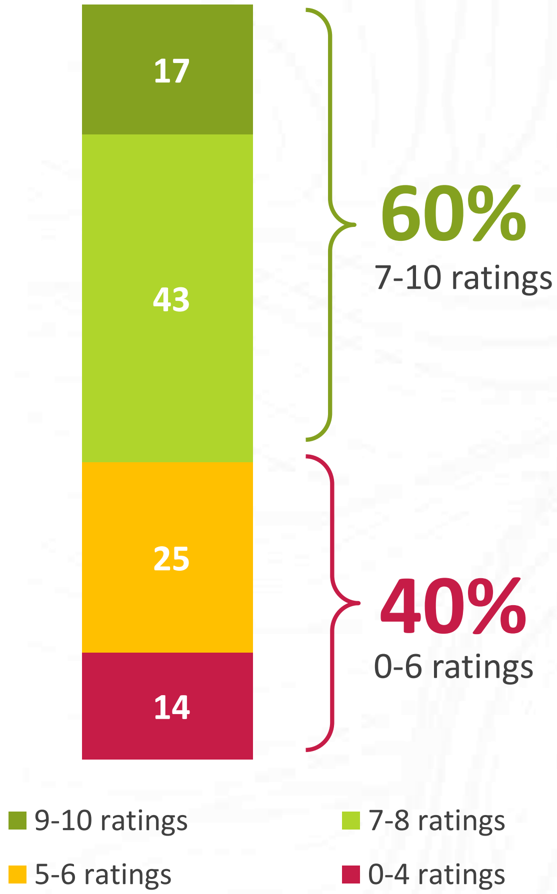
Despite positive signs on a range of other indicators this week, the UK's average national mood remains stubbornly consistent!

21 July – 23 July 2020

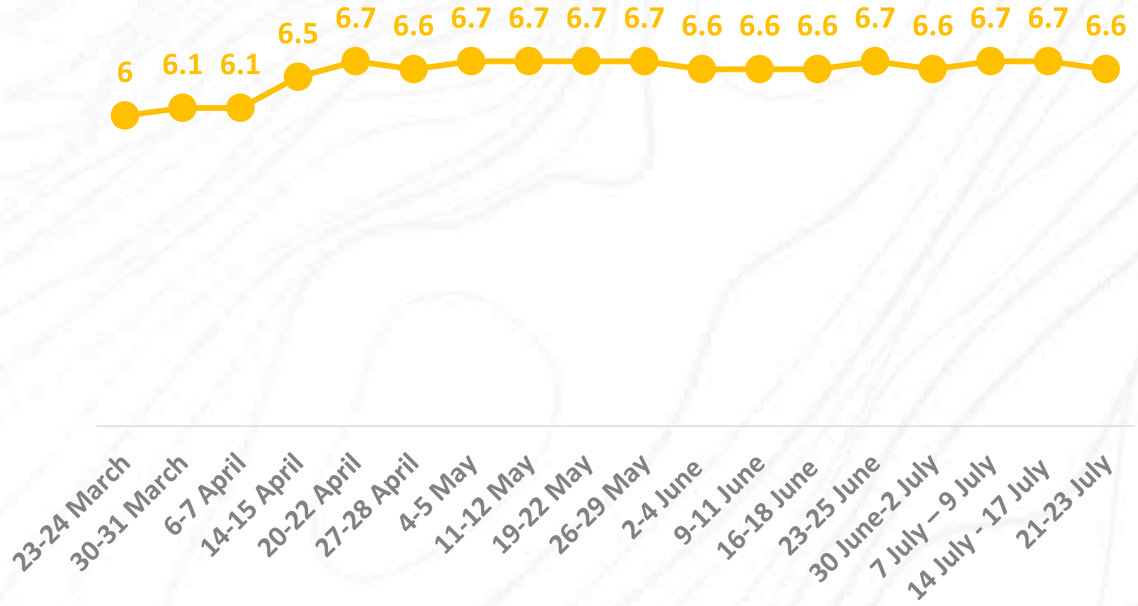
Average mood

6.6

21 July – 23 July 2020



Average mood week-on-week (UK Adults)



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

From social media: key themes underlying positive and negative sentiment

thoughts on @monzo Plus? I have immediately signed up. Being able to create your own categories. Being able to see my Barclays accounts too. Being able to have interest on your savings. I am SOLD.

Innovation

Really appreciate the way @Se_Railway call out people without masks on their trains. I know it sometimes puts guards at personal risk and hugely grateful for the effort.

Effective rules enforcement

TerraCycle and Tesco have launched zero-waste refill shopping platform - Loop. I love this idea.

Sustainable innovation

Cancelled Holiday of 2020 is rebooked for 2021!! So easy, didn't have to sit on phone for bloody hours or talk to anyone! Thank you @TUIUK @easyJet & @TravelodgeUK for making the voucher system work so well & so efficiently. We WILL go get some sun, sea & sand next year! 🌞⛱🌊

Service continuity

First time out of the country since #COVID19 - first impressions are that @Eurostar are handling it all brilliantly.

Effective rules enforcement

Can you cut the VAT on single parent run independent businesses whom were excluded from the furlough pay scheme please!

'Forgotten' businesses

Having spent 3 days in the parks (with 1 more morning to go) I feel I can say this with complete confidence. Disneyland Paris is SAFE. Every measure is being adhered to and guests are following them. If you had doubts over safety in the resort, you have nothing to worry about.

Building customer confidence

Dear @Gatwick_Airport and @easyJet, could you please make sure your employees wear masks properly at all times and not when they feel like? Wearing a mask on one's chin does not count...

Faulty rules enforcement

Really disappointed with @TUIUK. They are offering a £500 incentive to rebook when holidays are cancelled. However, as I changed our hotel BEFORE our hols was cancelled (as original hotel not opening), they won't apply the incentive. We should have waited for them to cancel!

Lack of service continuity

The amount of people not wearing masks on your trains are mad @greateranglia Probably should get that looked at

Faulty rules enforcement

Segmenting the consumer market

Introducing our COVID-19 Consumer 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

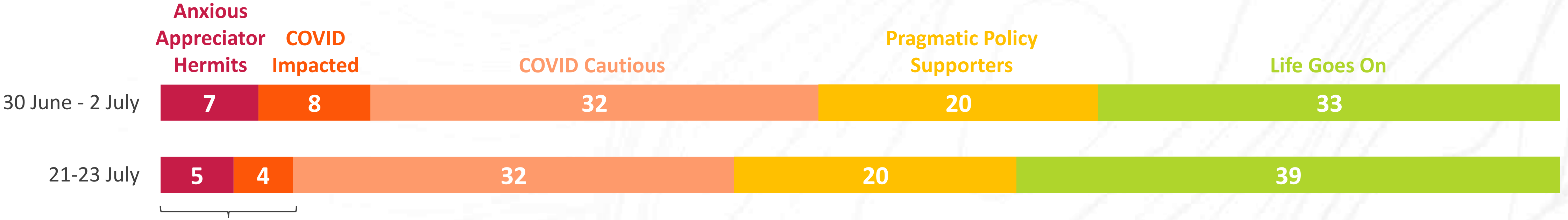
While they are less concerned about the impact of the pandemic on themselves, this segment fears that we may not yet be past the worst and would prefer a longer lockdown. They are likely to be cautious in their own post-lockdown behaviour.

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.



Significantly fewer consumers now fall into the two most 'concerned' segments – only 9% vs. 15% three weeks ago.

More information about what a segmentation is, go to the Appendix

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While bus and rail travel remains considerably less widespread than pre-COVID, it continues to recover among all attitudinal segments. For air travel, however, it remains ‘early days’.

Jan-Mar 2020

Segment (size)	Anxious Appreciator Hermits (5%)	COVID Impacted (4%)	COVID Cautious (32%)	Pragmatic Policy Supporters (20%)	Life Goes On (39%)
Travelled by bus	23%	29%	27%	24%	22%
Travelled by train	23%	23%	24%	18%	20%
Travelled by plane	8%	7%	10%	9%	9%

Since June 2020

Segment (size)		Anxious Appreciator Hermits (5%)	COVID Impacted (4%)	COVID Cautious (32%)	Pragmatic Policy Supporters (20%)	Life Goes On (39%)
Travelled by bus	7-9 Jul	4	5	5	5	5
	14-17 Jul	9	11	10	9	11
	21-23 Jul	12	15	11	10	13
Travelled by train	7-9 Jul	1	2	2	1	3
	14-17 Jul	3	5	4	3	6
	21-23 Jul	5	6	6	6	7
Travelled by plane	7-9 Jul	0	0	1	0	0
	14-17 Jul	0	0	1	0	1
	21-23 Jul	1	0	1	0	2

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

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The great outdoors continues to attract the lion's share of consumer leisure time, with zoos also winning back visitors from across all segments.

	Segment (size)	Anxious Appreciator Hermits (5%)	COVID Impacted (4%)	COVID Cautious (32%)	Pragmatic Policy Supporters (20%)	Life Goes On (39%)
Jan-Mar 2020**	Went to an outdoor park/ scenic area	25%	19%	21%	21%	16%
	Visited a theme park	2%	2%	2%	3%	4%
	Visited a zoo	4%	3%	2%	2%	4%
	Visited an aquarium	2%	1%	2%	2%	2%
	Visited a museum/gallery	11%	10%	10%	8%	8%

Since June 2020*		Anxious Appreciator Hermits (5%)	COVID Impacted (4%)	COVID Cautious (32%)	Pragmatic Policy Supporters (20%)	Life Goes On (39%)
Went to an outdoor park/ scenic area	7-9 Jul	9	13	8	10	9
	14-17 Jul	21	21	22	21	18
	21-23 Jul	24	21	27	24	19
Visited a theme park	7-9 Jul	0	0	0	0	0
	14-17 Jul	0	1	0	1	1
	21-23 Jul	0	1	0	1	2
Visited a zoo	7-9 Jul	1	2	0	1	1
	14-17 Jul	3	2	1	1	2
	21-23 Jul	3	2	2	1	2
Visited an aquarium	7-9 Jul	0	0	0	0	0
	14-17 Jul	0	0	0	0	1
	21-23 Jul	1	0	0	0	1
Visited a museum/ gallery	7-9 Jul	0	0	0	0	0
	14-17 Jul	0	0	0	0	1
	21-23 Jul	0	0	1	1	1

*rolling two weeks

**rolling three weeks

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

The draw of pubs and restaurants is starting to tempt even some Anxious Appreciator Hermits out of their homes, but patronage remains a fraction of pre-lockdown figures across all segments.

	Segment (size)	Anxious Appreciator Hermits (5%)	COVID Impacted (4%)	COVID Cautious (32%)	Pragmatic Policy Supporters (20%)	Life Goes On (39%)
Jan-Mar 2020**	Went to a restaurant	44%	40%	42%	43%	33%
	Went to a pub	34%	33%	33%	33%	27%
	Went to a shopping mall/shopping trip	41%	39%	35%	37%	25%

			Anxious Appreciator Hermits (5%)	COVID Impacted (4%)	COVID Cautious (32%)	Pragmatic Policy Supporters (20%)	Life Goes On (39%)
Since June 2020*	Went to a restaurant	7-9 Jul	1	1	1	2	4
		14-17 Jul	2	2	4	7	9
		21-23 Jul	4	3	6	11	11
	Went to a pub	7-9 Jul	0	2	2	2	3
		14-17 Jul	2	4	6	7	10
		21-23 Jul	4	5	8	9	15
	Went to a shopping mall/shopping trip	7-9 Jul	7	6	6	8	7
		14-17 Jul	9	12	12	15	15
		21-23 Jul	9	13	14	15	18

*rolling two weeks
**rolling three weeks
q1a- And when exactly was the last time you did the following activity/activities

Holidaying remains significantly below pre-COVID levels, but domestic trips edge upwards across most segments.

	Segment (size)		Anxious Appreciator Hermits (5%)	COVID Impacted (4%)	COVID Cautious (32%)	Pragmatic Policy Supporters (20%)	Life Goes On (39%)
Jan-Mar 2020**	Went on UK holiday		7%	4%	7%	8%	8%
	Went on overseas holiday		4%	6%	8%	8%	7%
	Stayed in paid for accommodation		13%	11%	14%	13%	11%
Since June 2020*	Went on UK holiday	7-9 Jul	0	0	1	1	1
		14-17 Jul	0	0	2	2	2
		21-23 Jul	1	0	3	4	3
	Went on an overseas holiday	7-9 Jul	0	0	0	0	0
		14-17 Jul	0	0	0	0	1
		21-23 Jul	0	0	0	0	1
	Stayed in paid for accommodation	7-9 Jul	0	0	0	1	1
		14-17 Jul	0	0	1	2	2
		21-23 Jul	1	0	1	3	3

*rolling two weeks
**rolling three weeks
q1a- And when exactly was the last time you did the following activity/activities

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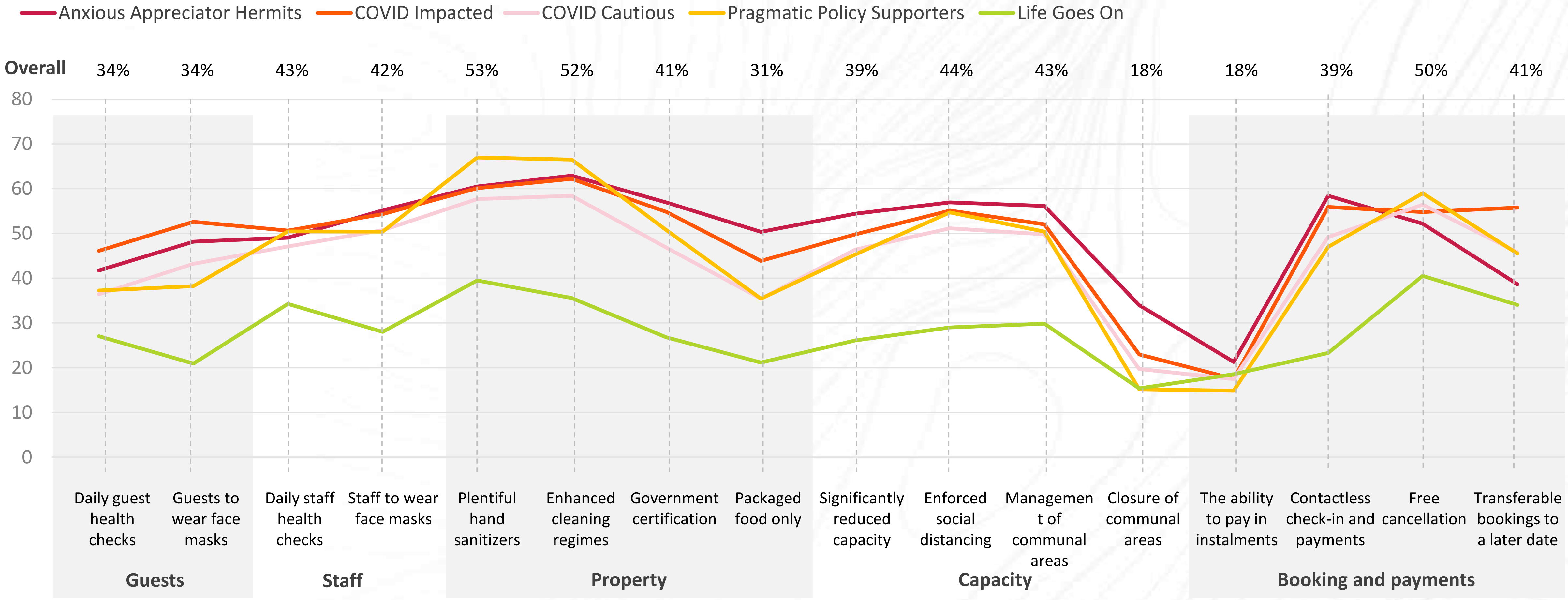
Health and safety reassurances remain essential for winning back accommodation guests, but there is little call for closure of communal areas – guests want access to the full offer.

Health & safety needs are fairly consistent across segments, with enhanced cleaning, provision of hand sanitizer and free cancellation the most important areas to advertise – especially for 'Pragmatic Policy Supporters' and 'Life Goes On' who are more likely to be staying in paid accommodation. Fewer conditions need to be met for 'Life Goes On' consumers.

Conditions for accommodation providers to have in order to be considered



q63new. Which, if any, of the following conditions would it be essential for accommodation providers to have in place for you to stay at them this summer?

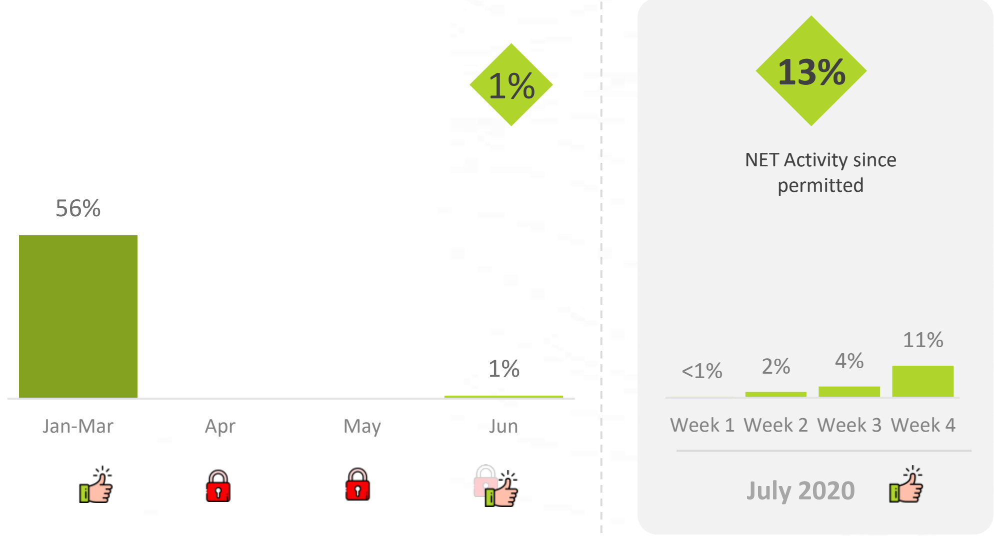
Travel and leisure

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 more visitor attractions continuing to re open throughout July, last week saw a steep rise in the proportion that had done so. As people get used to the precautions put in place by attractions and initial visits receive good reviews, we see confidence build. The intention to visit by the end of August has increased to the highest levels seen since May, with people wanting to make the most of what's left of the summer. Combined with previous visits, this represents a big net increase in engagement.

Visited a visitor attraction since permitted



This week

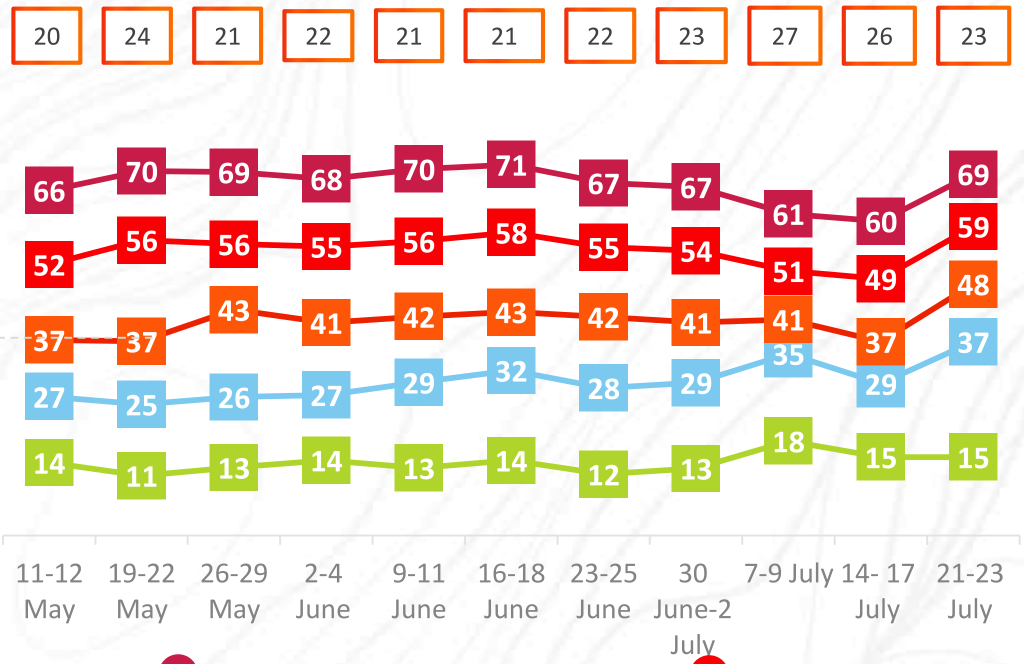
5.3

Average time **since** the activity last done

2.1

Average time **before** doing 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

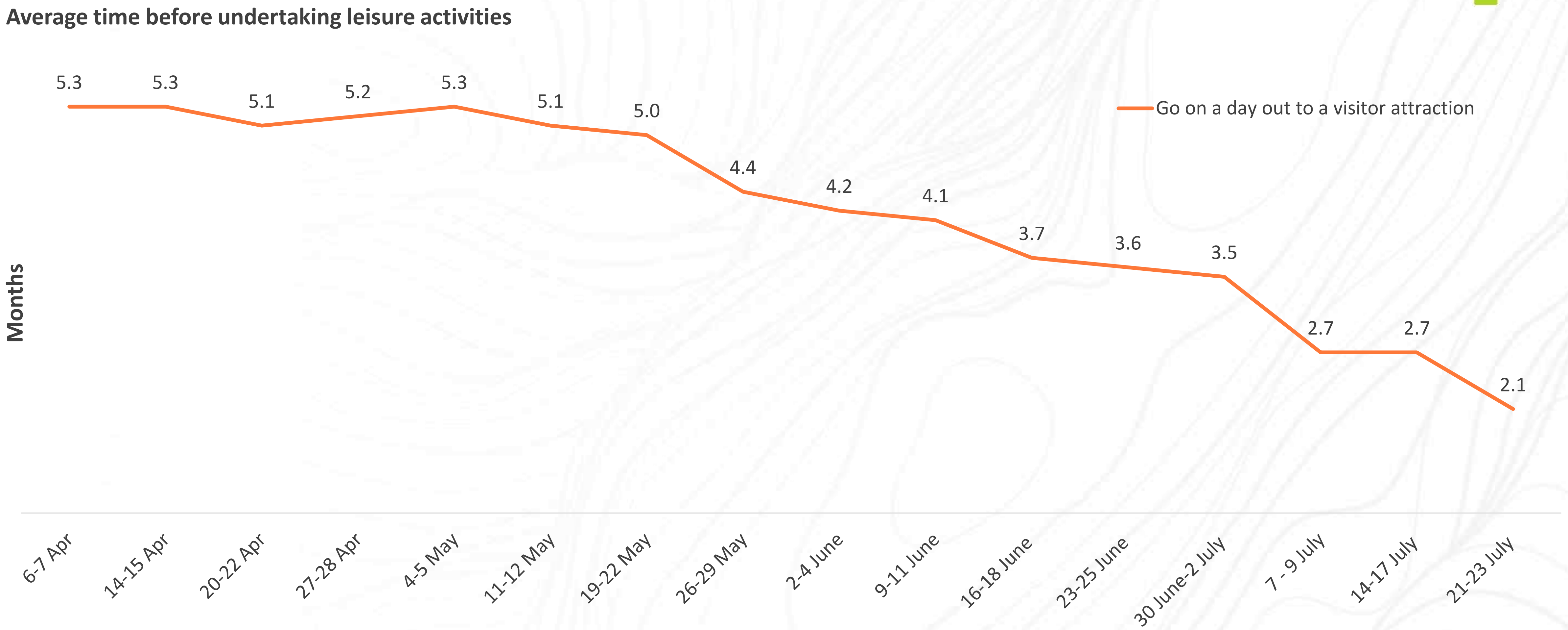
By end of September 2020

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?

Among those intending to go to a visitor attraction (who have a definite view as to when they will do so) average lead times drop this week to the lowest levels since April.



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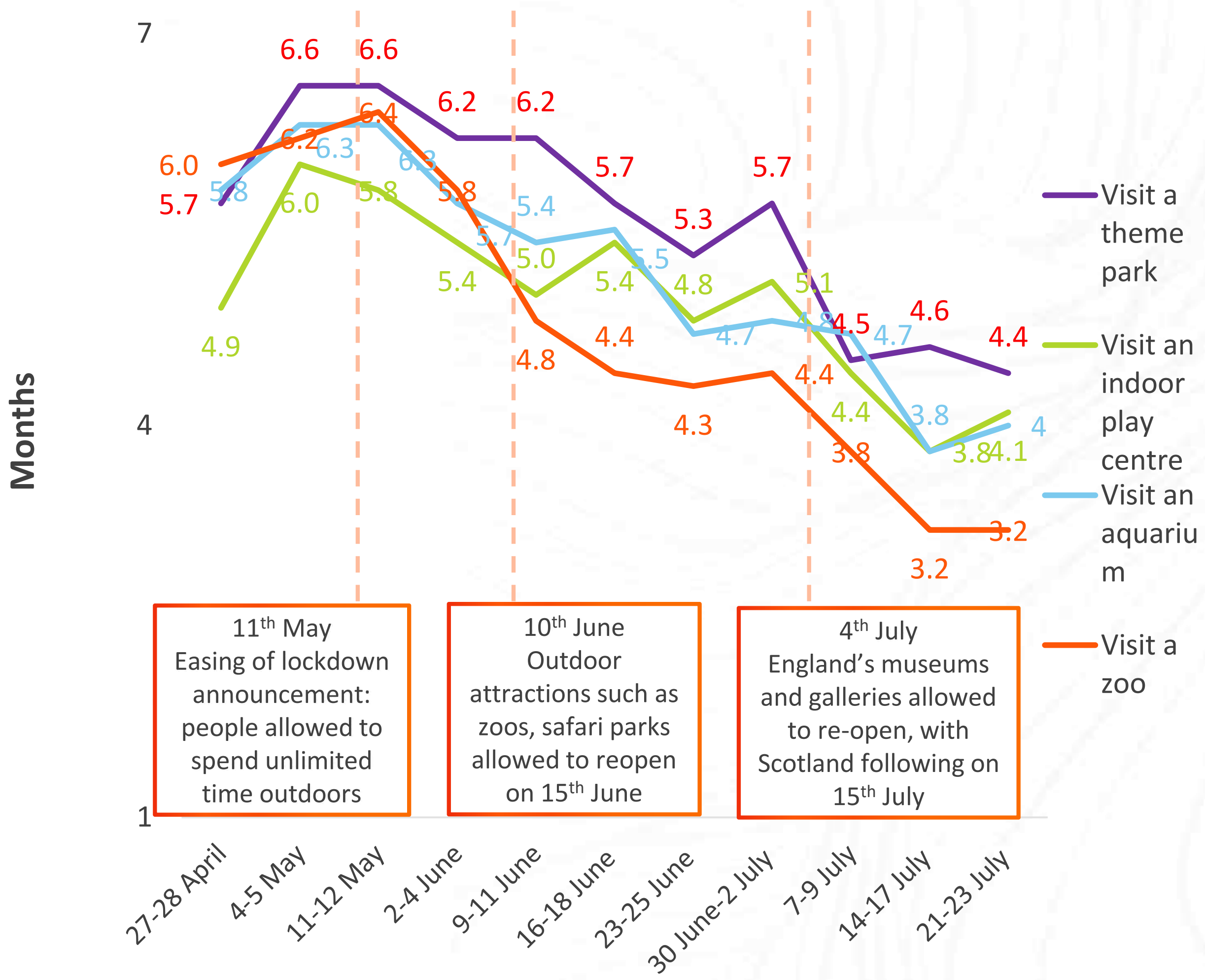
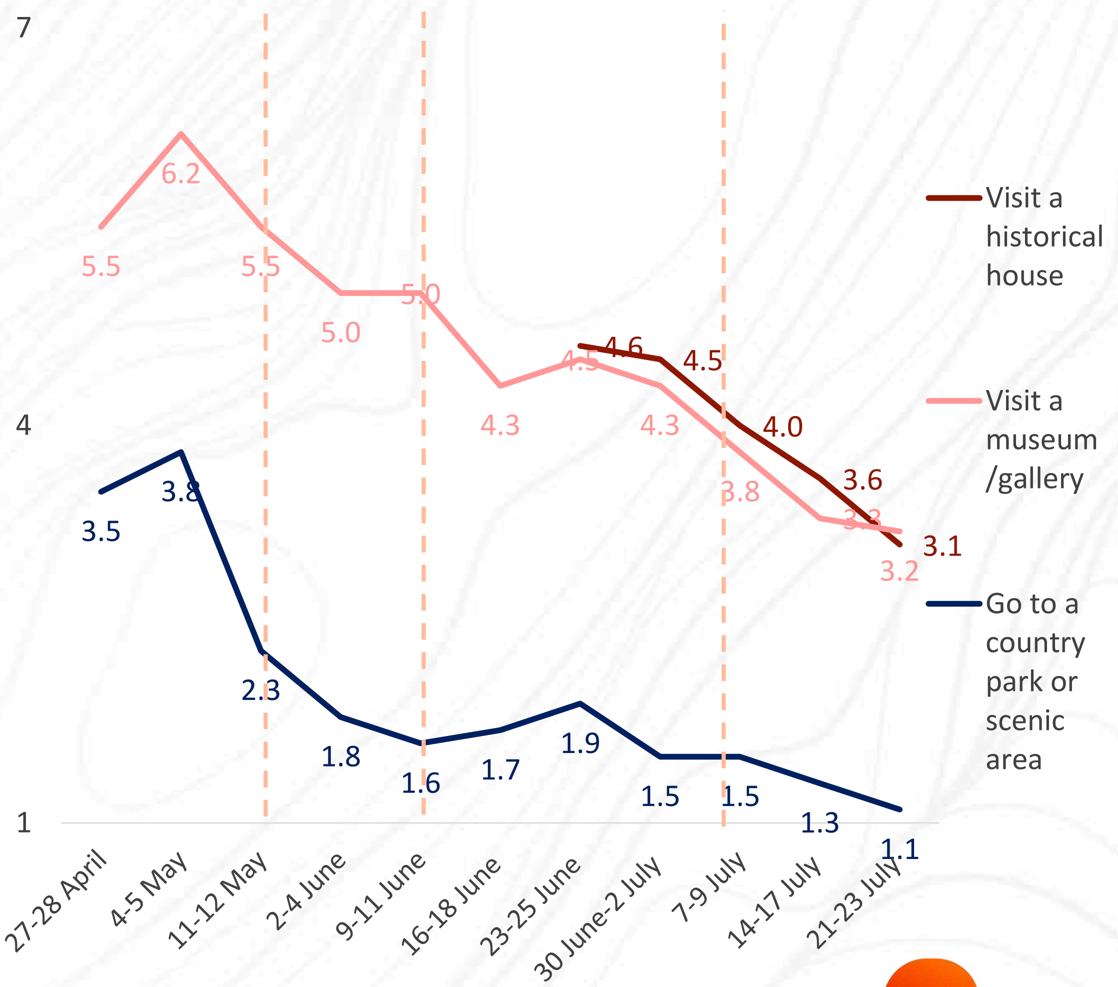
The lead time for visiting museums, galleries and historic houses continues to shorten, with the exception of aquariums and indoor play centres who see an increase for the first time since June.

Average time before undertaking leisure activities





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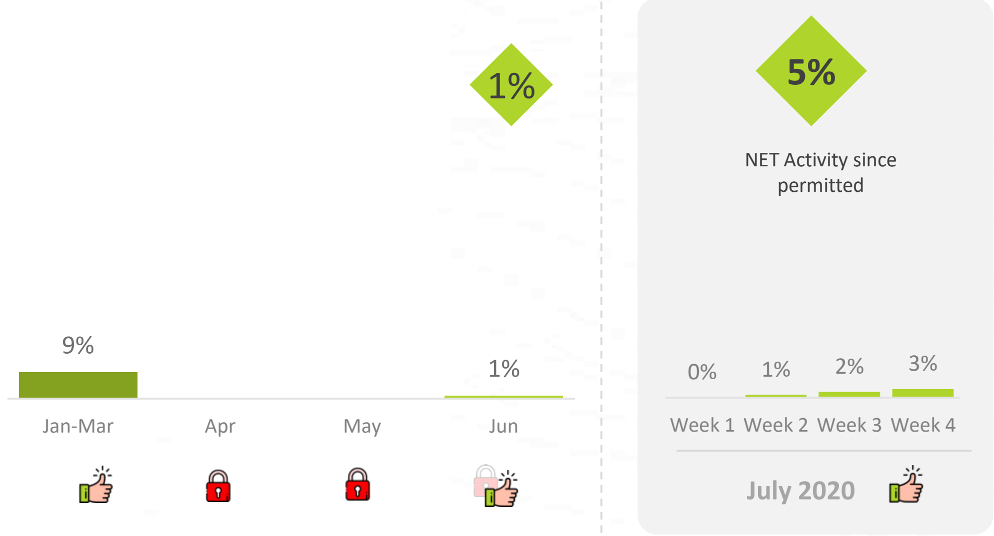
Market Recovery Tracking: Visit a zoo

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

The intention to visit a zoo by the end of year continues to rebound, with 21% likely to do so by the end of September. Following calls from celebrities to support local zoos, there has been growing interest in visiting. However, in keeping with government guidelines the capacity in zoos has been reduced and zoos have themselves been encouraging visits outside of peak times. Possibly due to this, and initial demand being met in July (5% have already visited) the intention to visit before the end of August has seen a slight drop on last week

Visited a zoo since permitted



This week

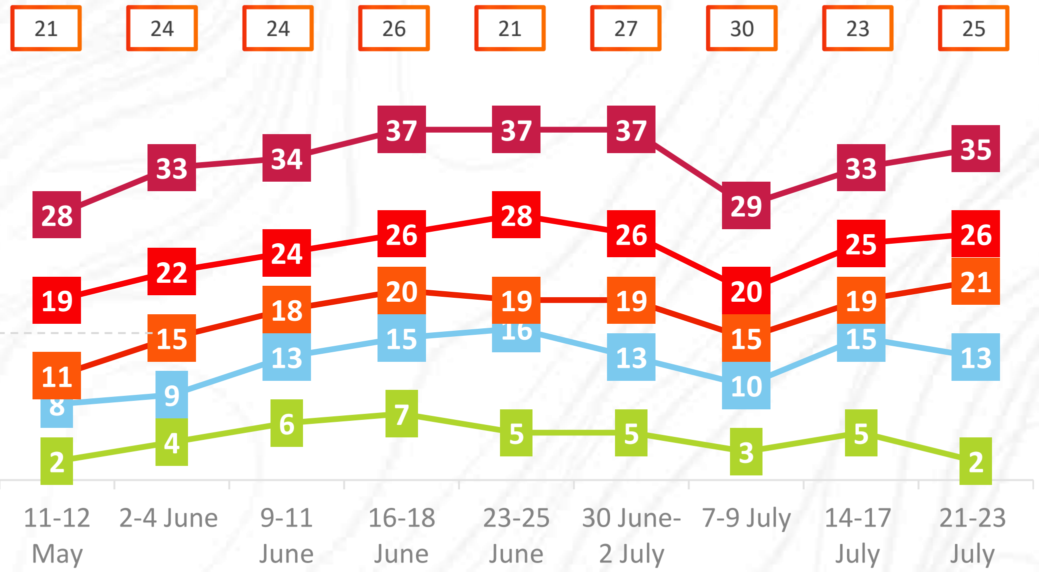
7.5

Average time **since** the activity last done

3.2

Average time **before** doing 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

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?

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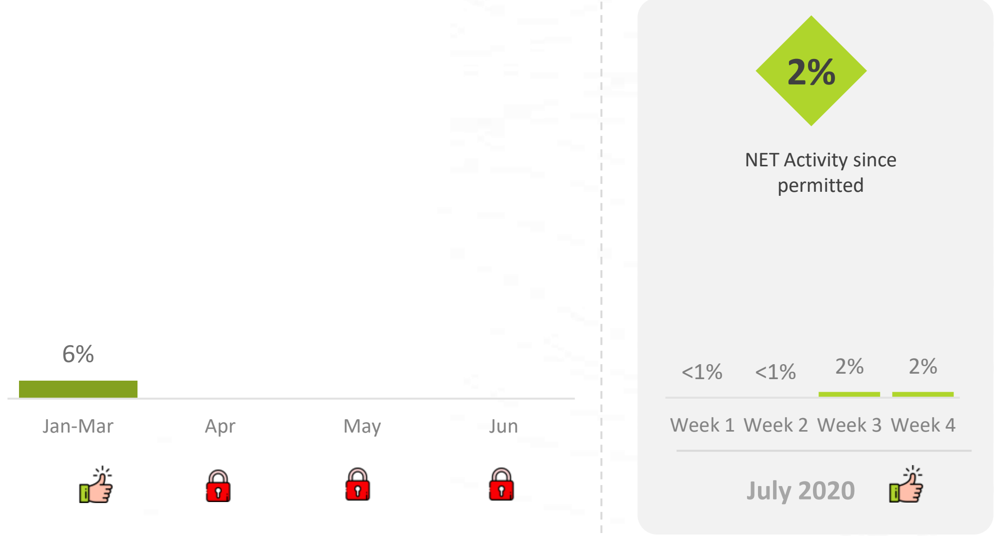
Market Recovery Tracking: Visit an aquarium

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

With aquariums re opening later than zoos, there may have been slightly more uncertainty around visiting. This week we see intentions to visit before the end of this year remain quite flat, with a small proportion having already visited.

Visited an aquarium since permitted

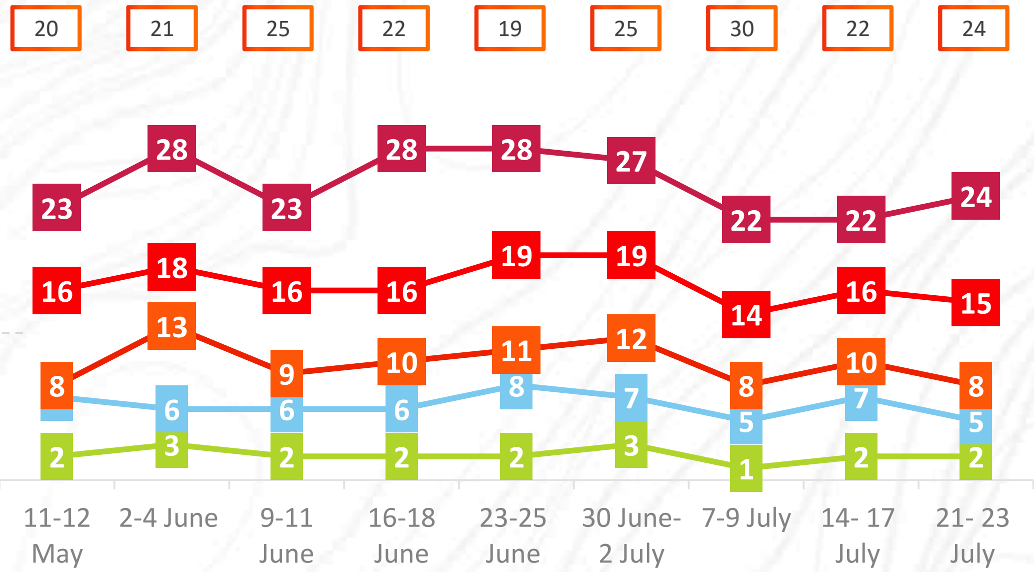


This week

8.0
Average time **since** the activity last done

4.0
Average time **before** doing 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

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?

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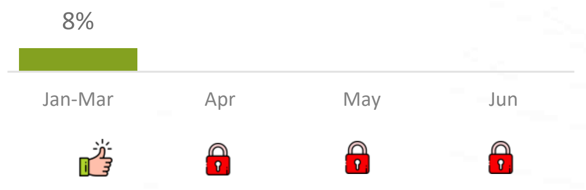
Market Recovery Tracking: Visit a theme park

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

Likelihood to visit a theme park continues to increase this week, with those looking to visit by end of September up 3 points to 15%. The growth appears to be *in* September with intention visit by the end of July and August relatively consistent with previous weeks. A small proportion have already visited.

Visited a theme park since permitted



This week

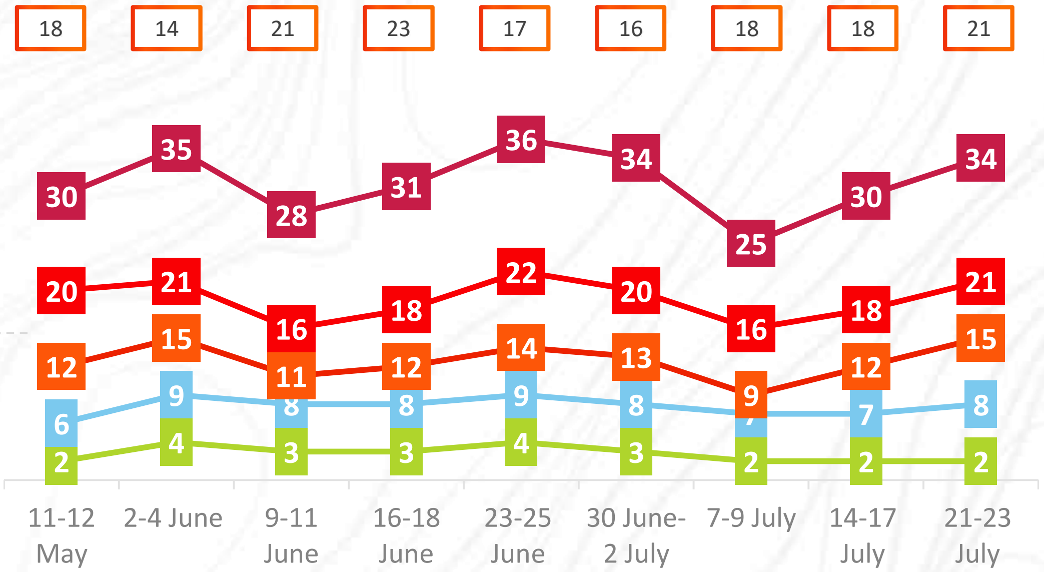
7.8

Average time **since** the activity last done

4.4

Average time **before** doing 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 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?

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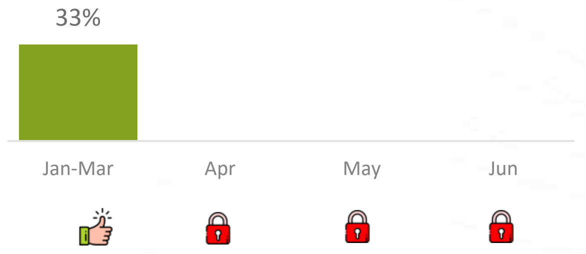
Market Recovery Tracking: Visit a museum/gallery

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

This week we see net activity increase to 4% for visiting a museum or gallery. As some major museums such as Somerset house and the National Gallery re-opened to great reviews and with more looking to reopen end of July / early August, intention to visit by end of September sees a slight uplift which may continue to increase if positive reviews of experiences and precautions reassure potential visitors.

Visited a museum/gallery since permitted

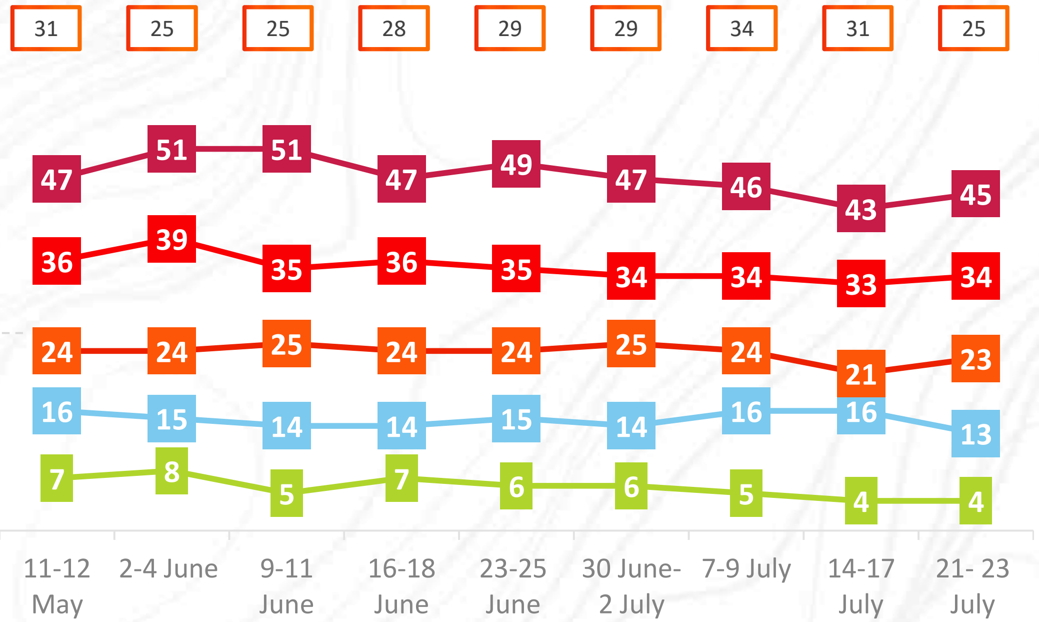


This week

6.9
Average time **since** the activity last done

3.2
Average time **before** doing 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

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: 3 major museums located in Kensington's cultural quarter announced their re-opening dates. Visitors reacted with excitement – but also with some queries around COVID-related restrictions.

"Brilliant to reopen our cultural quarter in South Kensington - looking forward to all their brilliant exhibitions starting up again!"

"HUZZAH. No better place to start re-fuelling your lockdown selves - book a timed ticket for @V_and_A from Aug 6. You can roam freely or follow one of our new self-guided tours AND tickets for the stunning Kimono: #KyotoToCatwalk are on sale again too."

"@NHM_London Are masks mandatory for children under 5? I have a little one that is obsessed with dinosaurs but will not use a mask Confused face."

"NHM_London So are these general admission tickets? How much are they? I know before the pandemic it was free admission to get into the museum."

"@SkyNews @V_and_A The ONLY way that these national treasures can open safely is if the infection-level is low and if visitors wear masks/visors and follow hygiene and social-respecting guidelines."

"Excited that Natural History Museum in London will reopen from 5th August. To keep everyone safe, a ticketed timed entry system is in place. Tickets will be available online from 10am on Thurs 16th July #NaturalHistoryMuseum #Reopening #LondonIsOpen"

"Wonderful to see our Great @RBKC museums opening again. Recovery of London's Home of Arts and Science"

"Putting safety first as #SouthKensington cultural quarter plans to reopen."

"How exciting to see the Science Museum reopening. #DiscoverSouthKen #protectlivesprotectlivelihoods @RBKC"

"Just spent the last half hour booking entry tickets for the @NHM_London @sciencemuseum and @V_and_A. So looking forward to returning!"

"More good news from @SouthKensington #DiscoverSouthKen, as our cultural quarter prepares to reopen. #protectlivesprotectlivelihoods @RBKC"

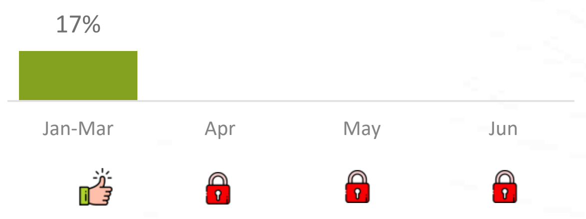
"Happy moments on the horizon. Starting to book exhibitions that are walking distance from home. Kimono @v_and_a for me +1 in August and September....."

Market Recovery Tracking: Visit a small historic house

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

The proportion of people who intend to visit a small historic house by the end of 2020 continues to increase slightly from 27% to 30%. With the National Trust having reopened a sample of their historic houses on 13th July and English Heritage looking to re-open some houses in early August, we see a gradual increase in the intention to visit by end of August from 12% to 14%.

Visited a small historic house since permitted



This week

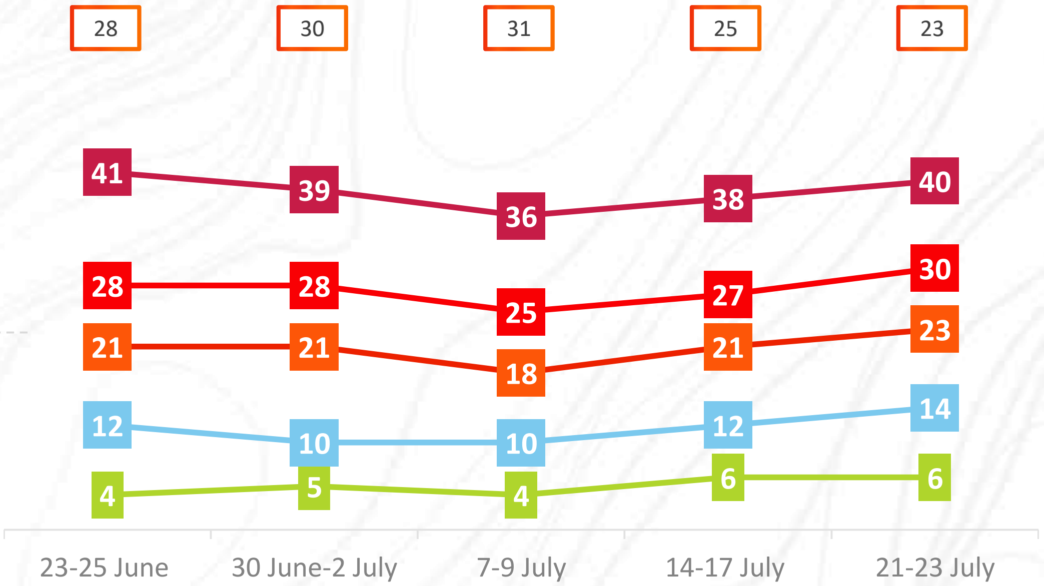
7.4

Average time **since** the activity last done

3.1

Average time **before** doing 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

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

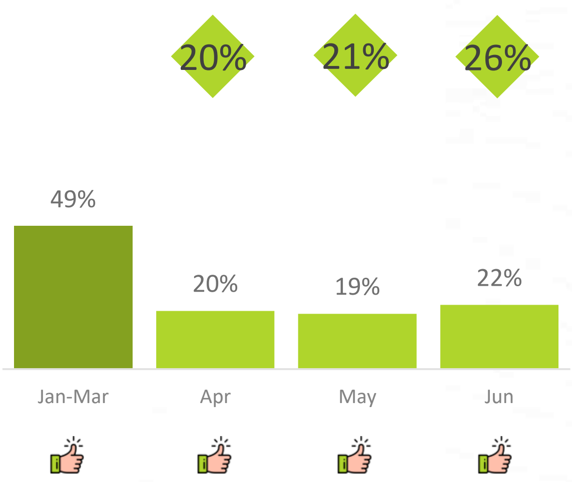
BVA BDRC

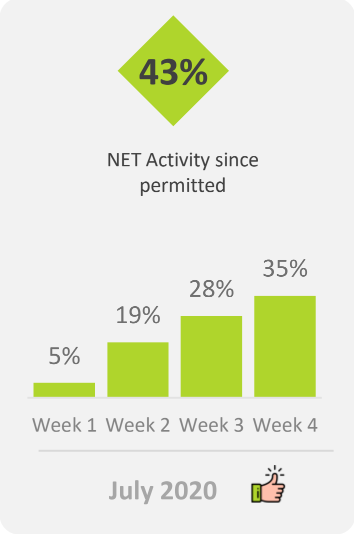
Market Recovery Tracking: Go to an outdoor park or scenic area

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

Intention to visit an outdoor space by end of July continues to increase as potential visitors look to make the most of the summer weather and 43% having already visited since permitted. With school summer holidays officially starting in most places on 22nd July, intention to visit an outdoor space by the end of August rises to 70% - the highest level seen since early May. The strong increases in intentions compared to modest rises for indoor visitor attractions is perhaps a further reflection of the public’s cautious approach to leisure.

Went to an outdoor park or scenic area since permitted





This week

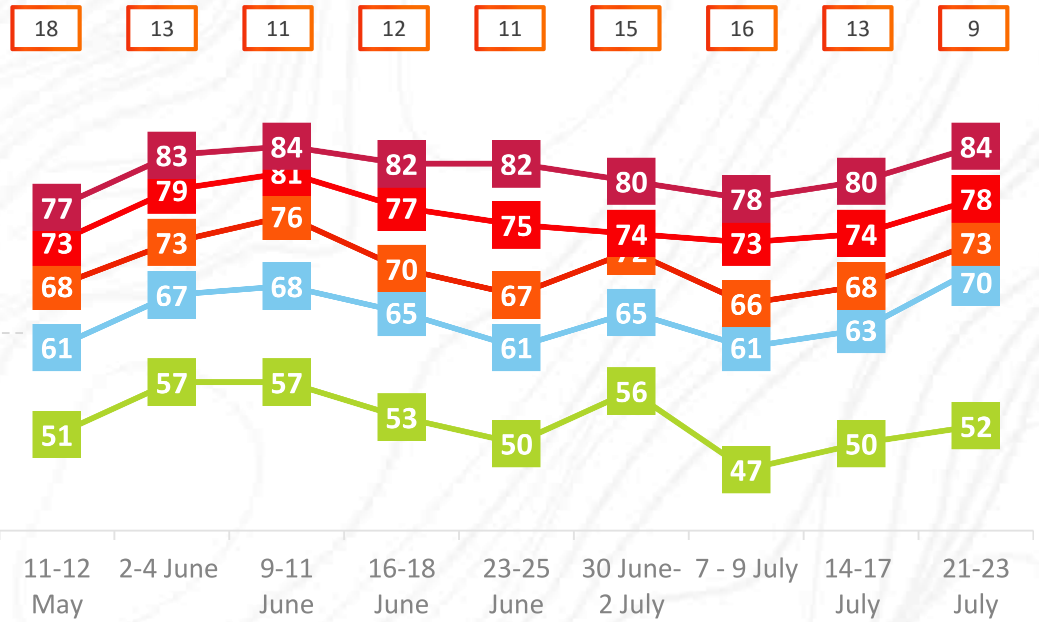
4.2

Average time **since** the activity last done

1.1

Average time **before** doing activity

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?

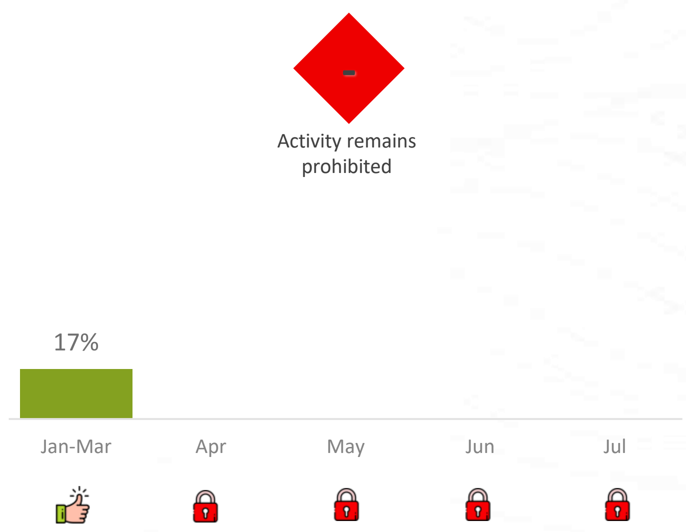
ALLIGATOR BVA BDRC

Market Recovery Tracking: Visit an indoor play centre

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

With indoor soft play areas still not permitted to reopen, there are no notable increases in intention to visit. There is however a glimmer of hope as other venues and facilities re-open, that soft play areas may be announced in near future.

Visit indoor play centre since permitted



NET participation since pandemic / activity permitted

Activity is not permitted

Activity is permitted

This week

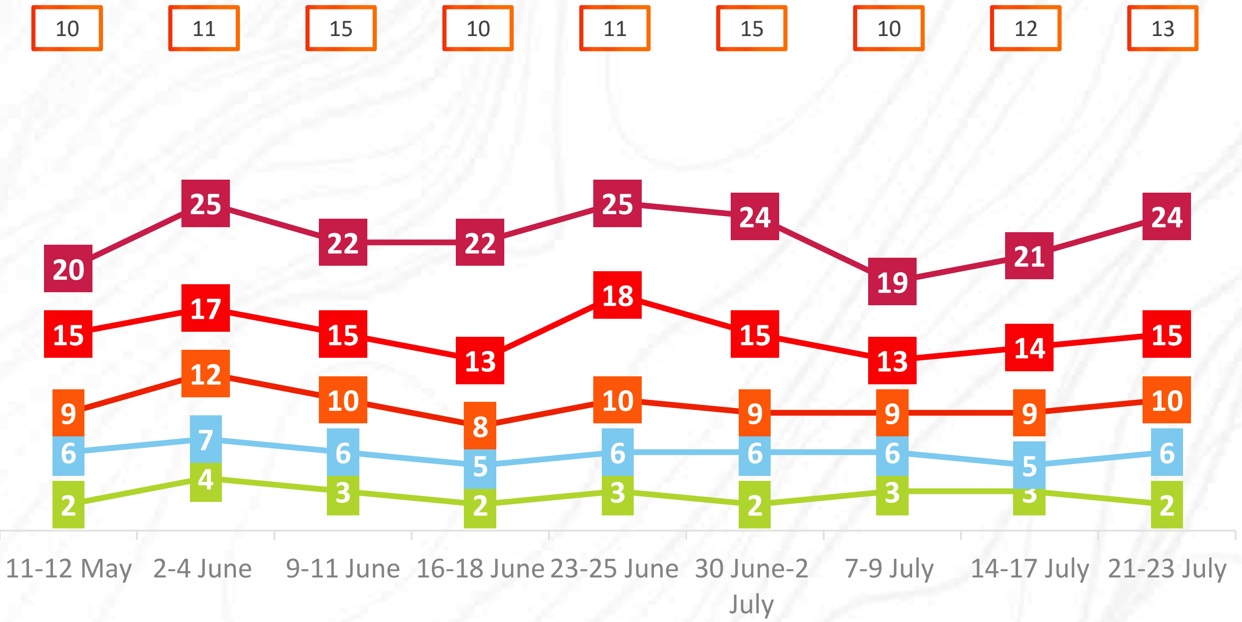
7.4

Average time **since** the activity last done

4.1

Average time **before** doing activity

When the activity will next be done



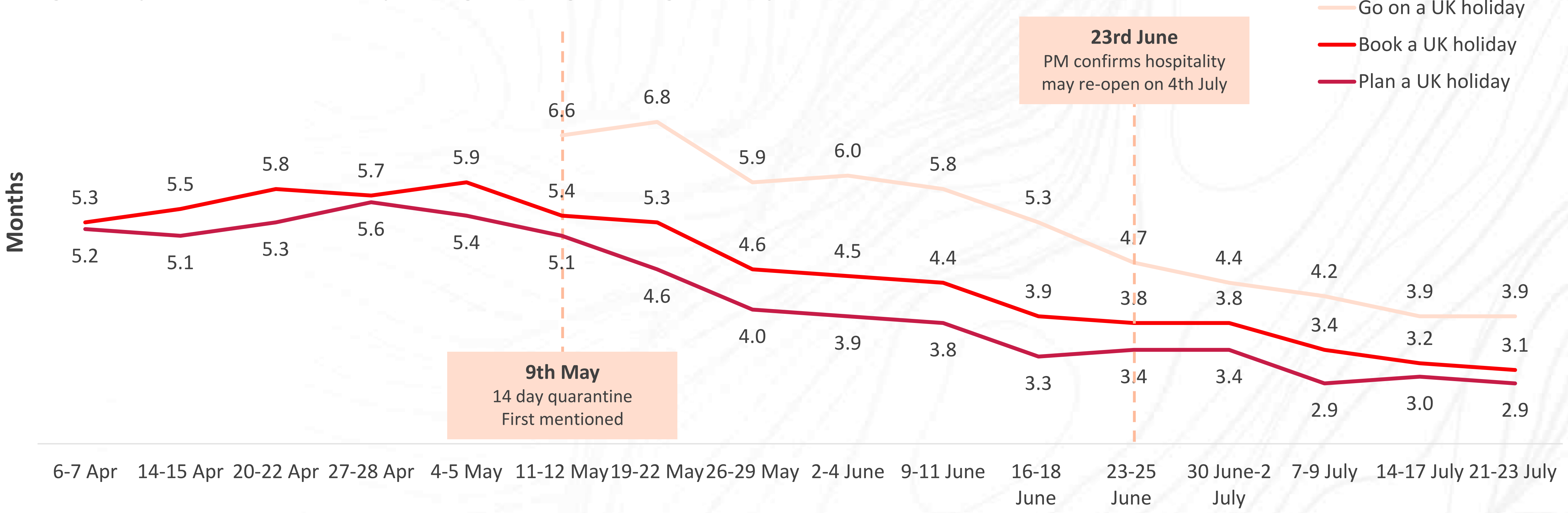
Planning on doing it but don’t know when
By end of April 2021 or later
By end of December 2020
By end of September 2020
By end of August 2020
By end of July 2020

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 the first time since early June, the average lead time for taking next UK holiday has not decreased. This will partly be driven by some people having *already* taken their summer trip.

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



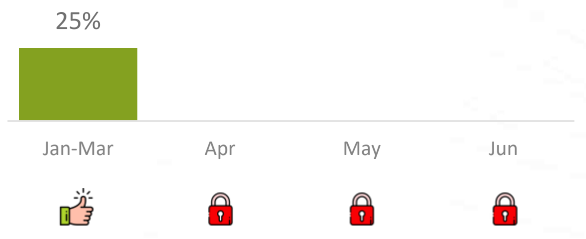
ALLIGATOR BVA BDRC

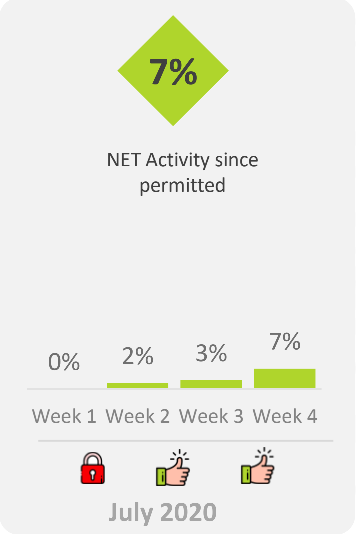
Market Recovery Tracking: Go on a UK holiday

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

Over a third of our travel activists plan on taking their next UK holiday between now and September, a consistent rise on the previous two weeks. When combined with the 7% that have taken a trip in July, the proportion of ‘summer’ holiday-makers is at its highest to date. Ultimately, it may fall short of being a genuinely nationwide staycation boom, but with UK holidays targeted at rural areas, certain parts of the country seem set to experience a boom in local tourism activity.

Go on a UK holiday this year





This week

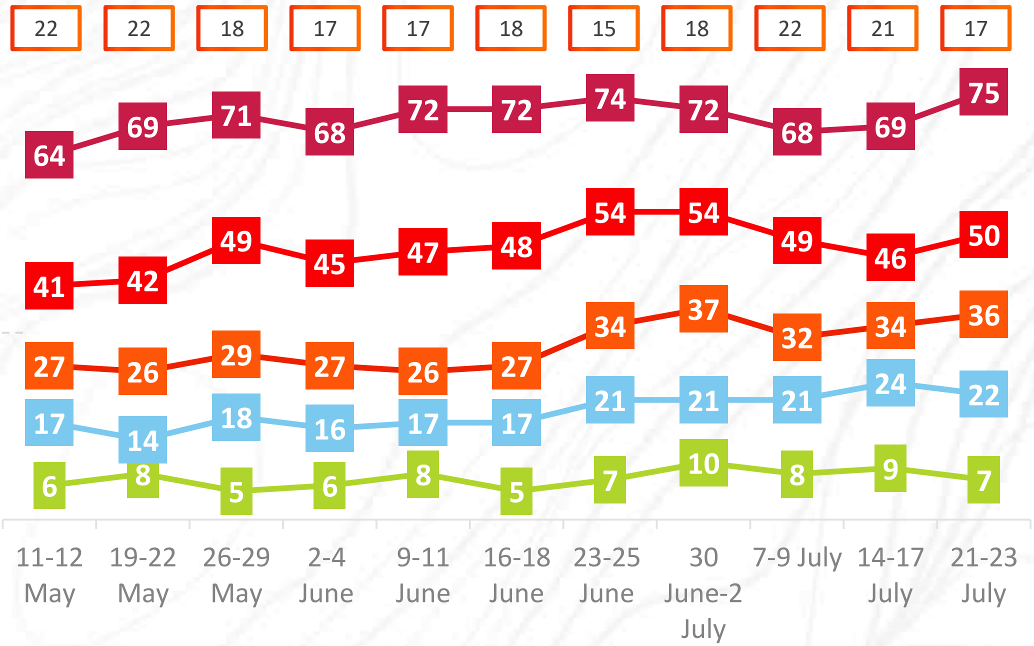
7.5

Average time **since** the activity last done

3.9

Average time **before** doing activity

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

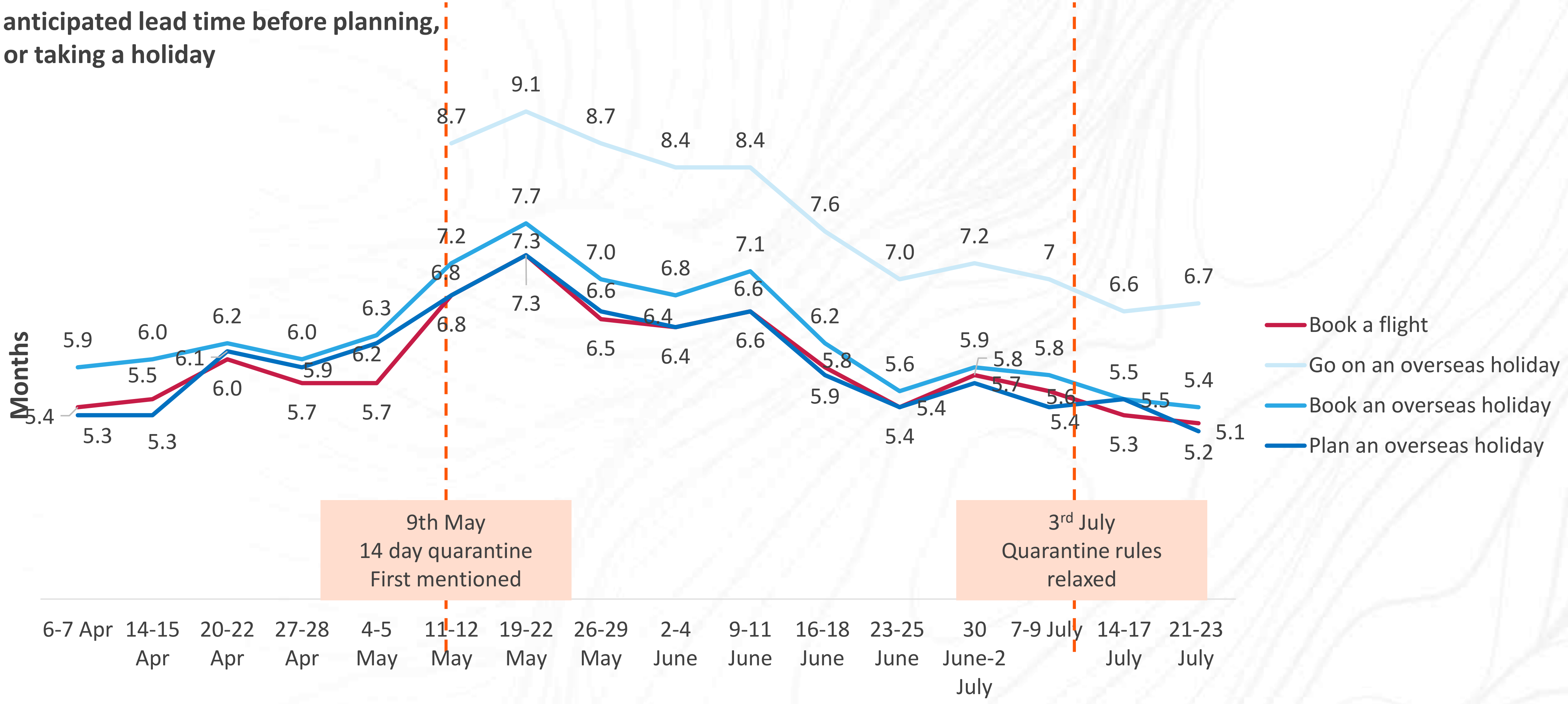
Activity is permitted

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?

ALLIGATOR BVA BDRC

Average lead times for going on an overseas holiday have marginally increased, with the Spain quarantine unlikely to reverse this trend

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



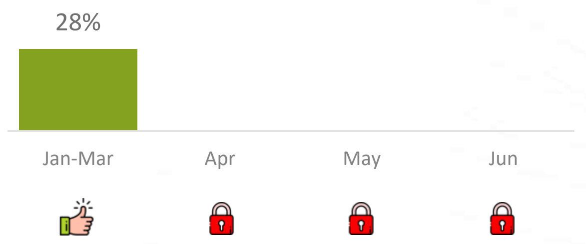
ALLIGATOR BVA BDRC

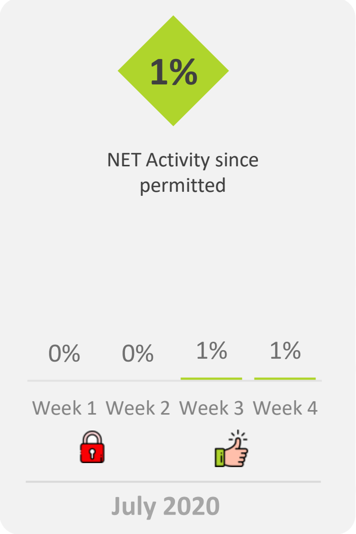
Market Recovery Tracking: Go on an overseas holiday

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

After weeks of stagnation, ‘next trip’ intentions for overseas holidays have dropped. Only 18% intend to take their next overseas trip by the end of 2020, and with just 1% having taken a trip in July, this represents a clear drop in holiday demand. The research was conducted before the Spain quarantine was introduced, so it’s likely that this percentage will drop even further in the coming weeks.

Go on an overseas holiday since permitted



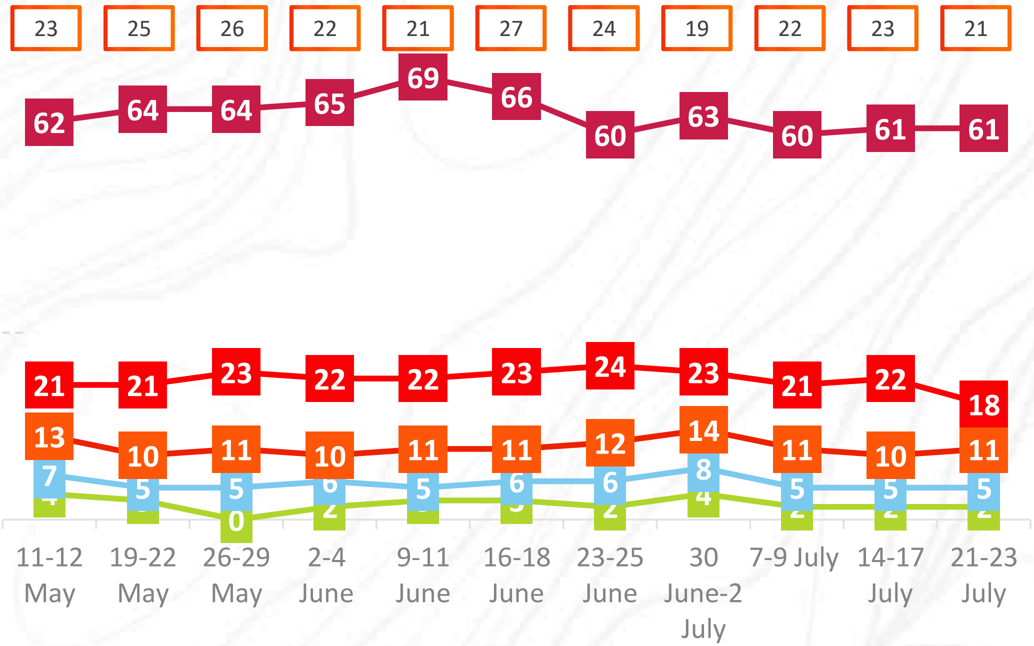


This week

8.0
Average time **since** the activity last done

6.7
Average time **before** doing 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

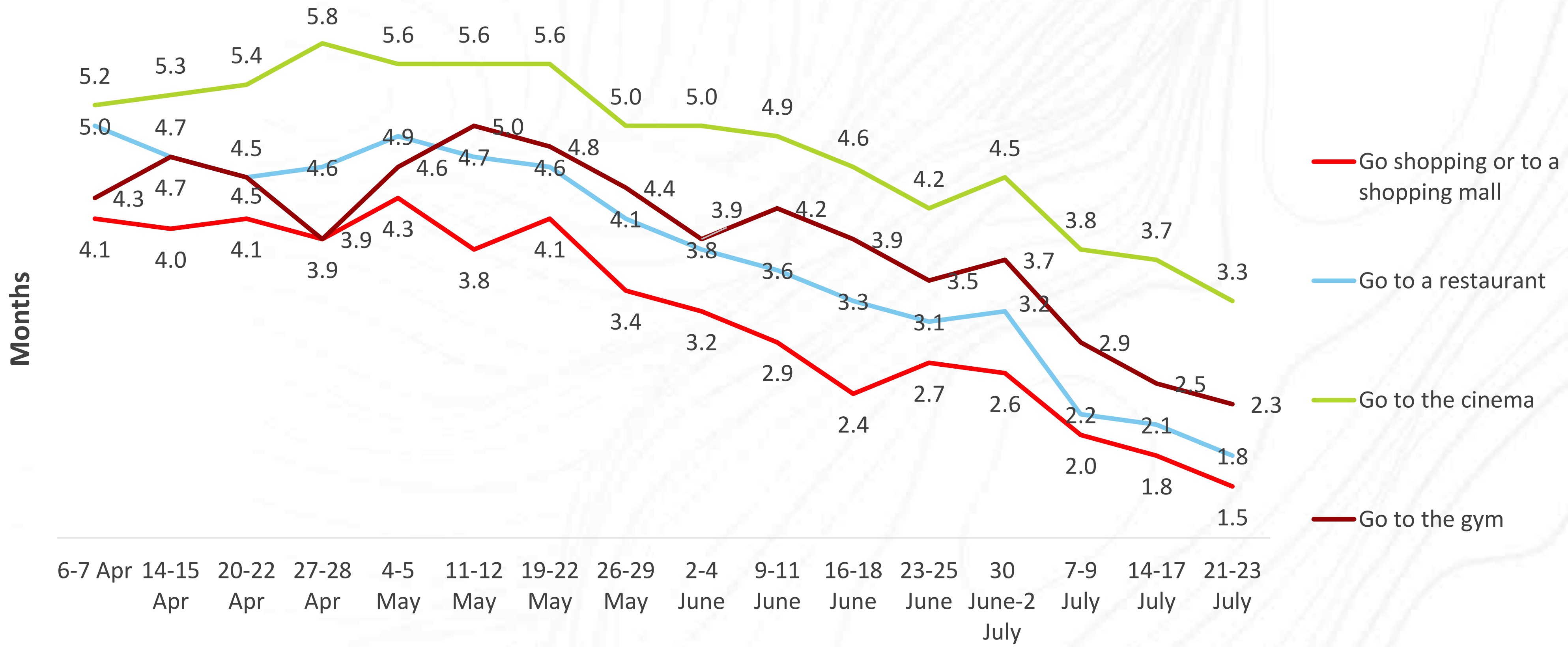
Q12. Given what you know today, when do you anticipate doing the following? Base all
Q1a. And when exactly was the last time you did the following activity/activities?

ALLIGATOR

BVA BDRC

The average lead time for going to a shop, restaurant, cinema or gym among those who want to do each activity continues to decrease

Average time before undertaking leisure activities

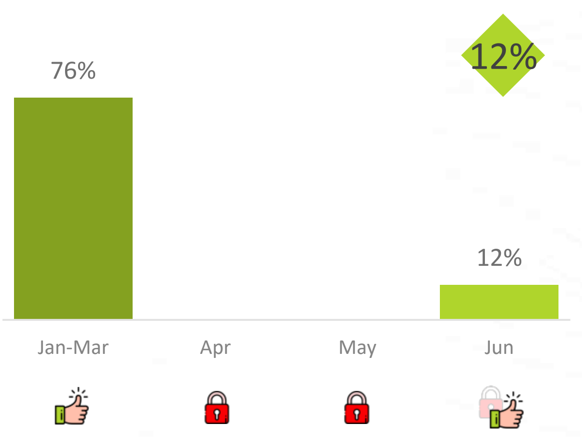


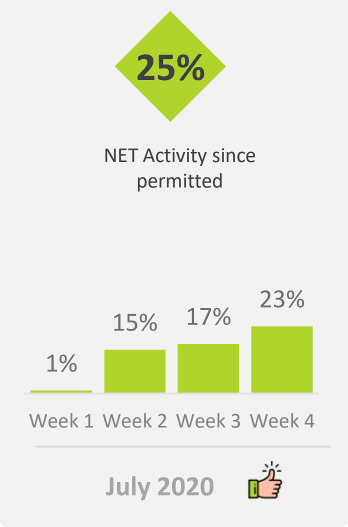
Market Recovery Tracking: Go on a shopping trip / to a shopping mall

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

1 in 4 Travel Activists have now gone on a shopping trip or visited a shopping mall since shops could re-open in June. Intention to engage in retail therapy by the end of August continue to rise, now over half intending to do so. The imposition of compulsory masks doesn't appear to have negatively impacted the appetite to go shopping, although next week's report – based on the experience of actually wearing them in shops – may paint a more accurate picture.

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





This week

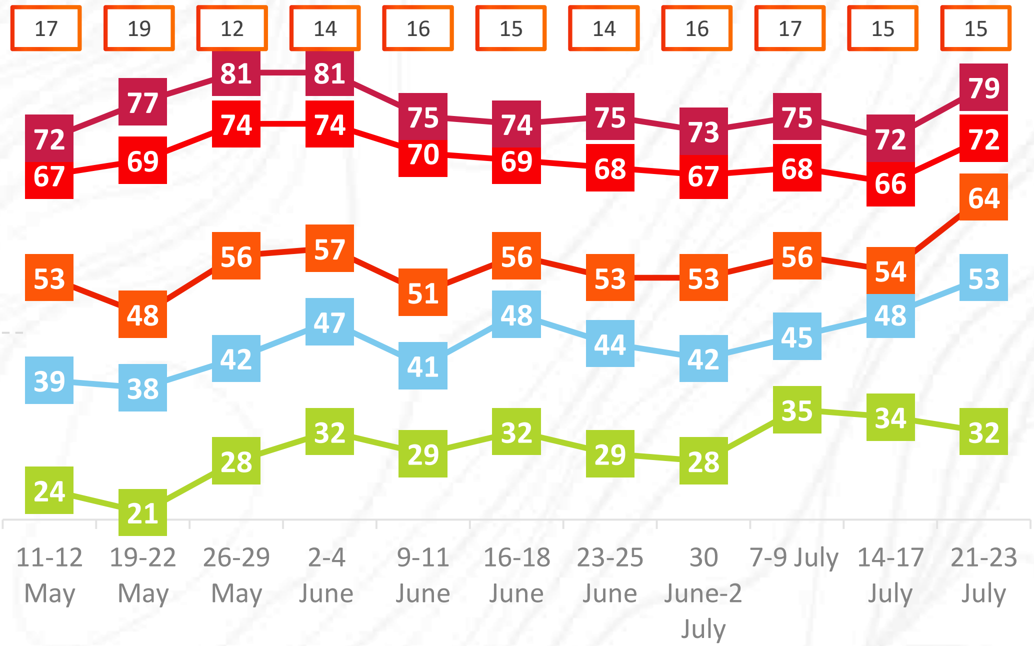
4.5

Average time <u>**since**</u> the activity last done

1.5

Average time <u>**before**</u> doing activity

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?

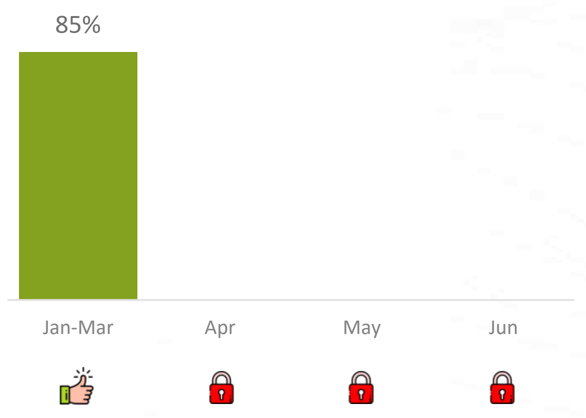
ALLIGATOR BVA BDRC

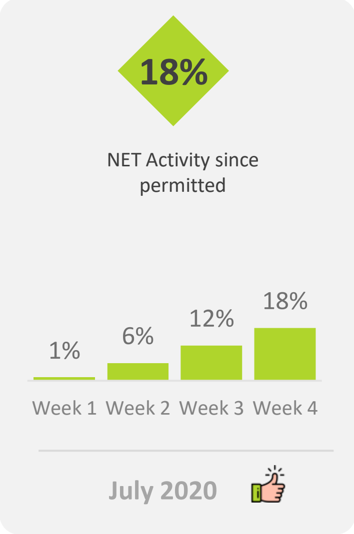
Market Recovery Tracking: Go to a restaurant

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

Comfort in dining out appears to be improving with another 6 percentage point increase in the proportion who have gone to restaurant since restaurants reopened. Furthermore, there has been a steep rise in the proportion intending to do this activity by the end of August, 42% last week to 48% this week . A combination of increasing confidence and the 'eat out to help out' scheme may be driving footfall.

Gone to a restaurant since permitted





This week

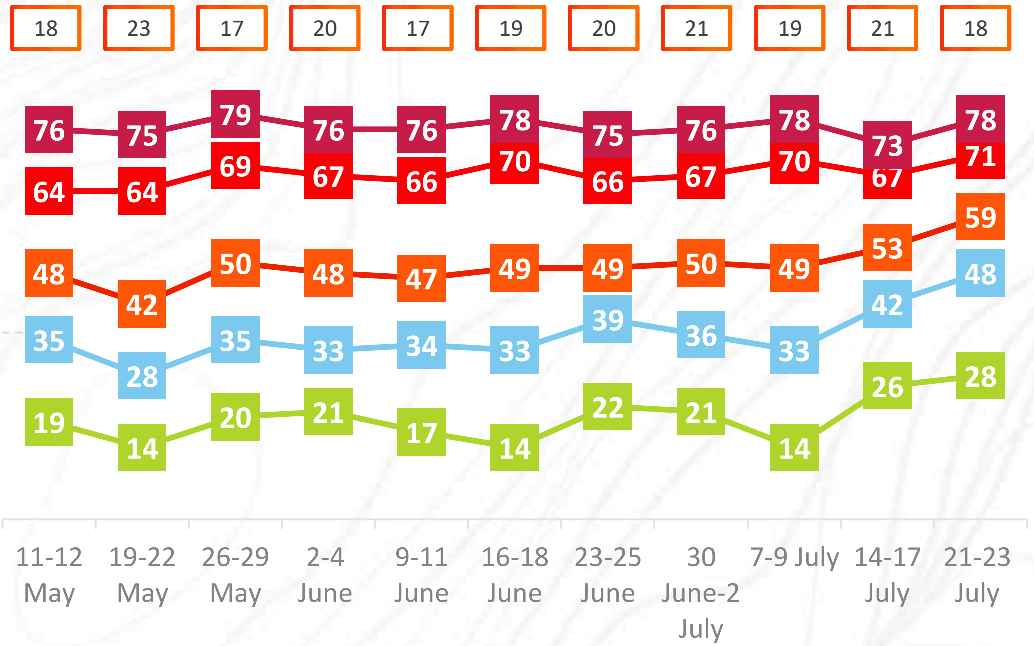
4.3

Average time **since** the activity last done

1.8

Average time **before** doing 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

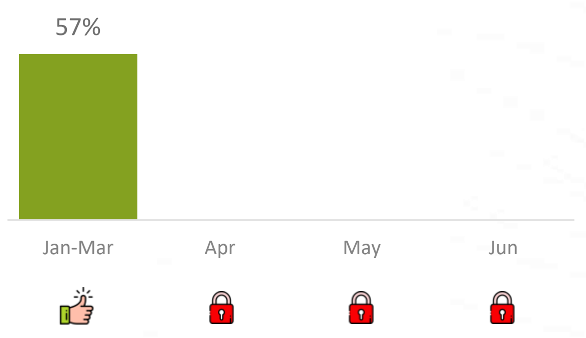
BVA BDRC

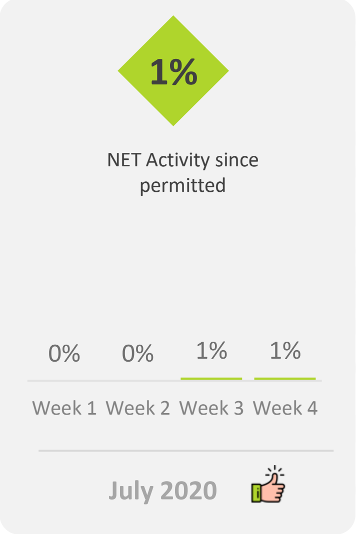
Market Recovery Tracking: Go to the cinema

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

With the release dates of blockbuster movies continually being pushed back (highly anticipated blockbuster Tenent has had three different release dates, and its US opening has now been delayed indefinitely), consumers remain cautious about returning to the cinema, with the proportion of people who are planning to visit a cinema by September still below its mid-June high.

Gone to the cinema since permitted





This week

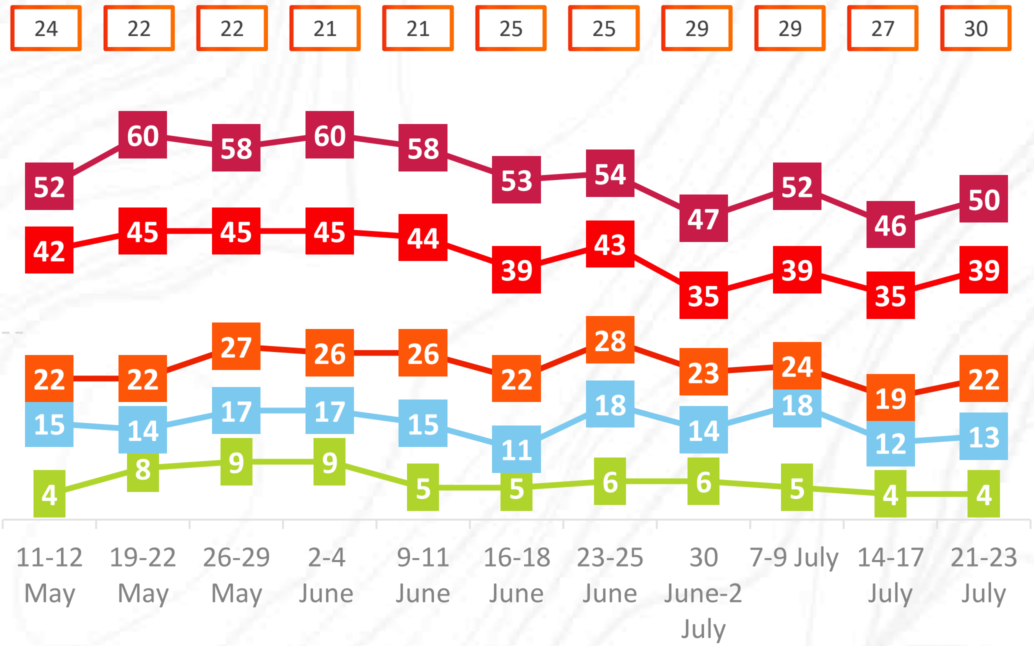
6.0

Average time **since** the activity last done

3.3

Average time **before** doing 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?

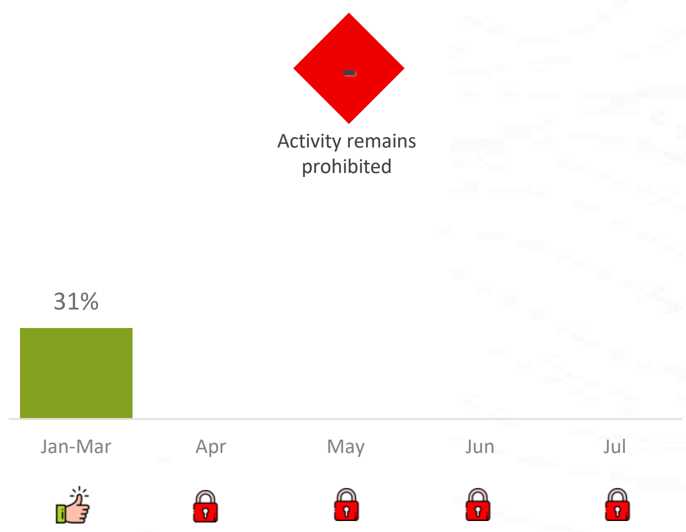
ALLIGATOR BVA BDRC

Market Recovery Tracking: Go to the gym

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

In the week that gyms in England have re-opened, intention to visit by the end of September is at its highest percentage to date, although at 24% is still behind the 31% that visited at the start of the year.

Gone to the gym since permitted



This week

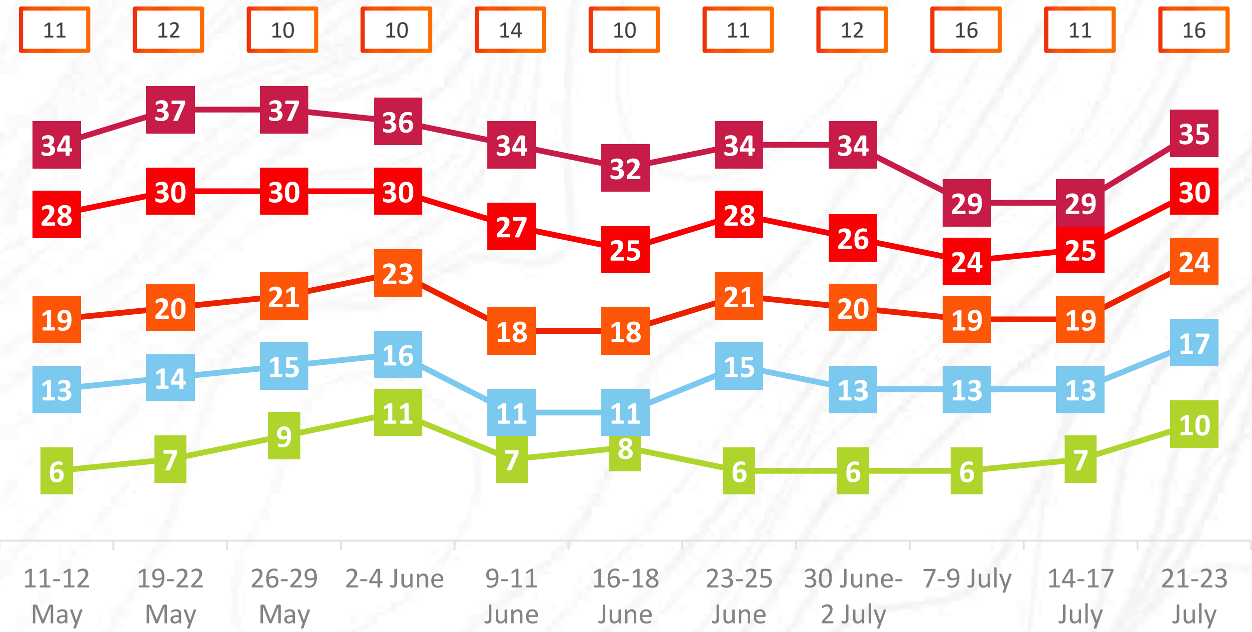
5.5

Average time **since** the activity last done

2.3

Average time **before** doing activity

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

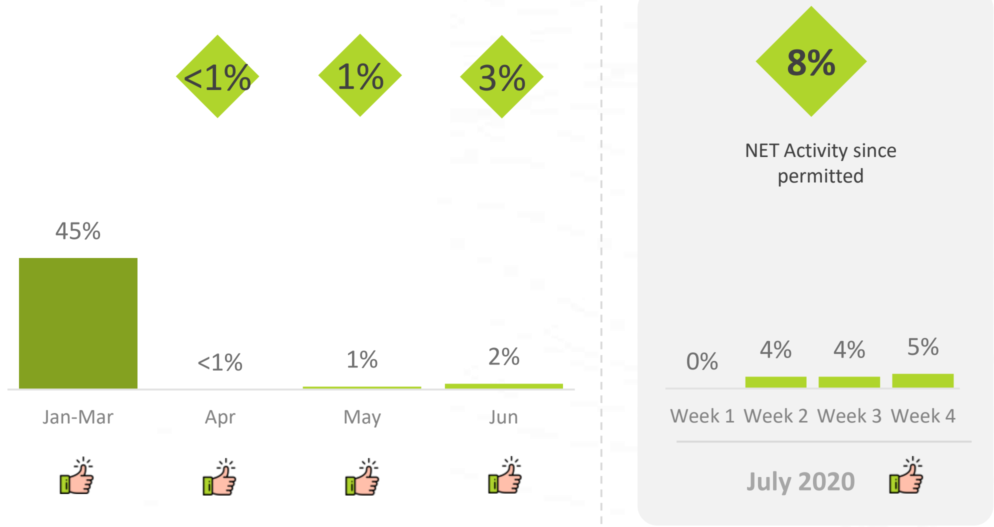
Q12. Given what you know today, when do you anticipate doing the following? Base all
Q1a. And when exactly was the last time you did the following activity/activities?

Market Recovery Tracking: Book hotel accommodation

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

For the majority of consumers, hotels are an occasional rather than regular purchase category, so it comes as little surprise to see the week-on-week increments in hotel staying to be limited. Approximately 8% of Travel Activists have booked hotel accommodation since the pandemic, compared to 45% in Q1 – this indicates the scale of the challenge in re-building demand. In the short term (for August and September) intentions are flat – though there is an increase in the proportion who anticipate booking a hotel before end of 2020.

Book hotel accommodation since permitted



This week

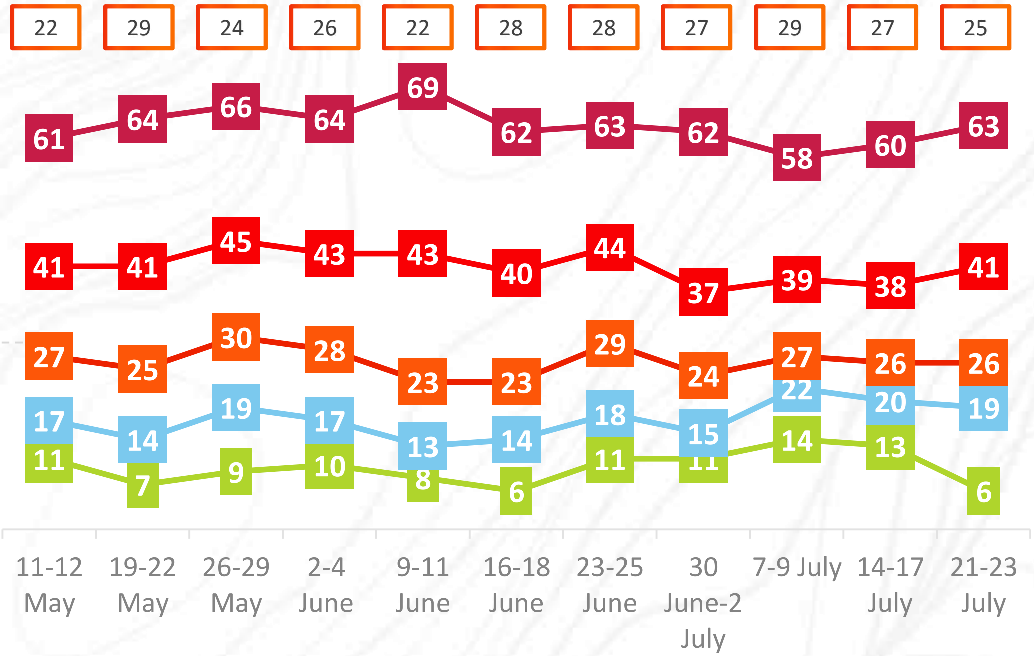
6.3

Average time **since** the activity last done

3.9

Average time **before** doing 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

On social media : the release of AirBnb's 'Kindness Cards' prompts backlash!

7th July – 13th July 2020

Net Sentiment = 38

"Thankfully Airbnb customer service are usually fantastic and v helpful... 👍"

"We stayed in this super cute Airbnb over the weekend. I want to the lady who owns it to come and decorate my house 😍"

"We have booked Airbnb with assurances from the owners of strict hygiene measures and sanitisation and use of bedding and towels which will be boiled between guests."

"Heard absolutely nothing - not even acknowledged my tweet. Disgraceful service 😫"

"This is my main gripe with Airbnb; you can't (usually) cancel after you've booked, but the host can drop you right up to the day before you arrive and you can't do anything!"

14th July – 20th July 2020

Net Sentiment = -65

"Airbnb has lost its head. Why would I donate to my host? I can't even afford one house"

"Daily reminder that there is a housing crisis and @Airbnb are out here acting like landlords are charities."

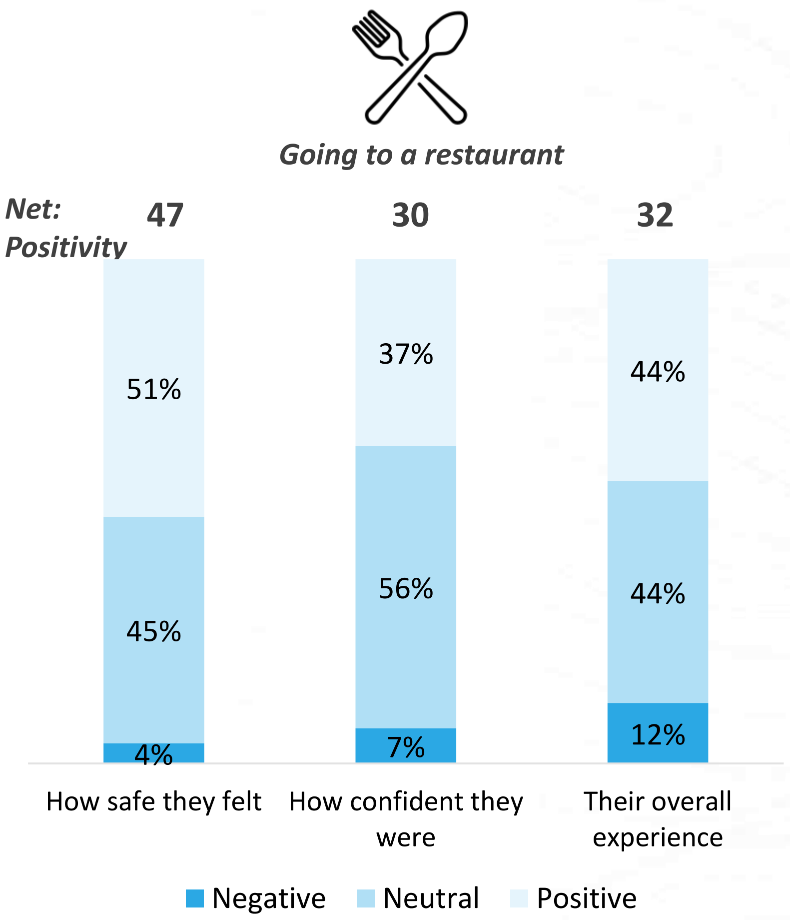
"Dear Airbnb host, thank you for making rent unaffordable in this city."

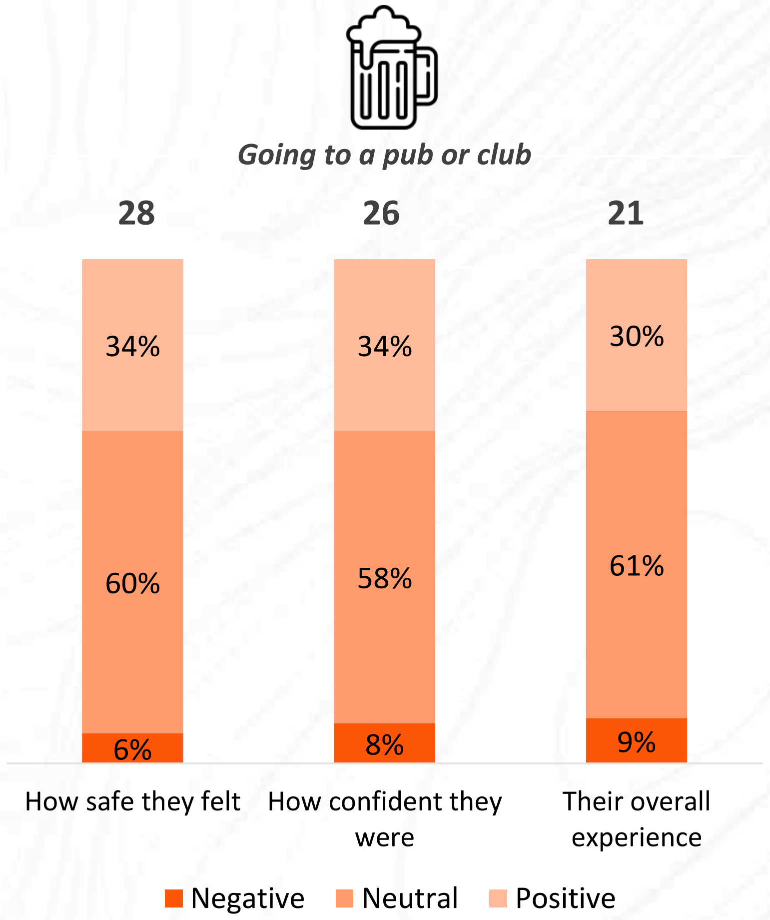
"Air B&B hosts have the luxury of owning a 2nd property they rent for profit. And you want ME to donate to YOU?! I'm struggling to pay my own mortgage, let alone help you pay the mortgage on your 2nd home"

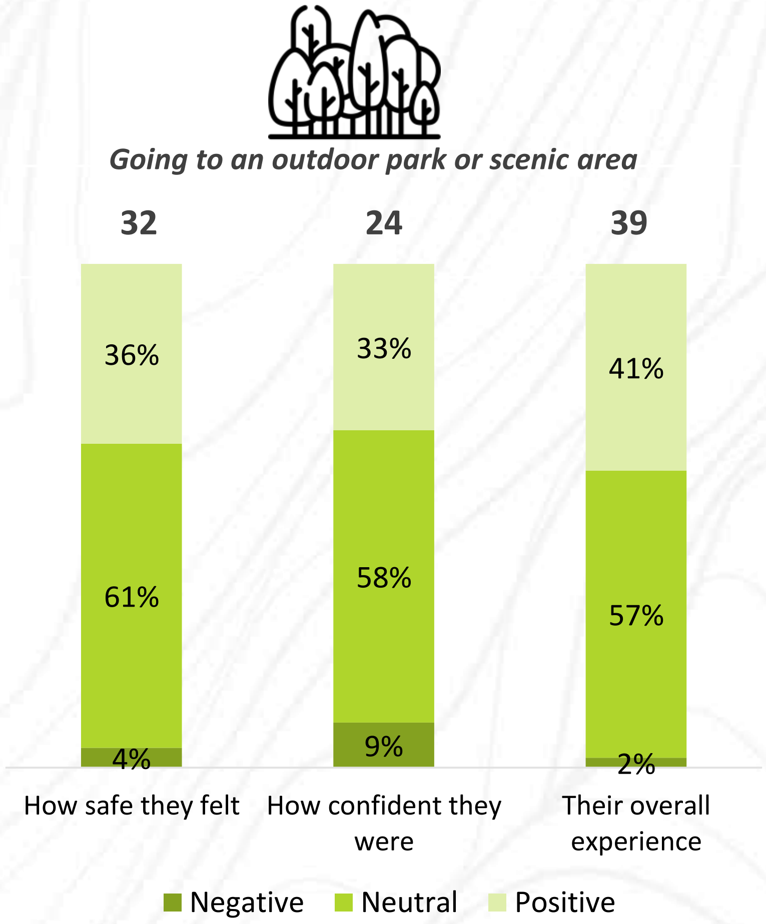
"@Airbnb couldn't possibly get worse! They've bilked 1000's of guests around the world out of refunds & then they pull this. #airbnb #airbnbshame #AirbnbrefundNOW"

"What kind of distopian hell is this Airbnb ask renters to donate to struggling landlords"

Restaurants, pubs, clubs and attractions record more positive than negative feedback from early post-lockdown visitors – but there is scope to shift ‘neutral’ opinion into ‘positive’ territory.







QTF3. You have indicated earlier that you [ACTIVITY] since June? Please rate your experience

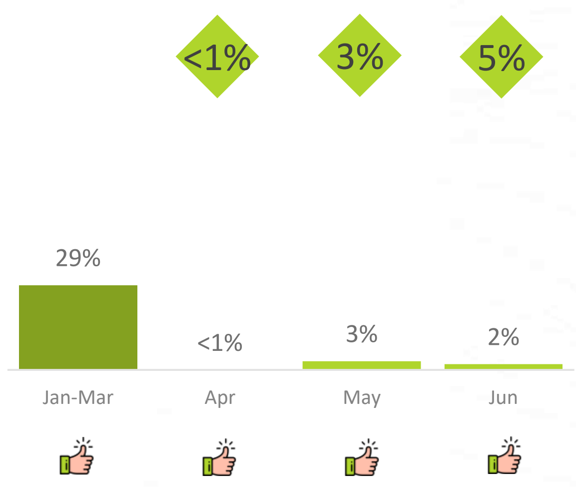
Transport

Market Recovery Tracking: Book a flight

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

In comparison to other travel verticals, the news and outlook for aviation is distinctly less encouraging. Against a backdrop of new COVID outbreaks in key destinations, imposition of renewed quarantine arrangements, not to mention continued concerns over health risks, it remains very early days on the road to recovery.

Have done the activity since permitted



This week

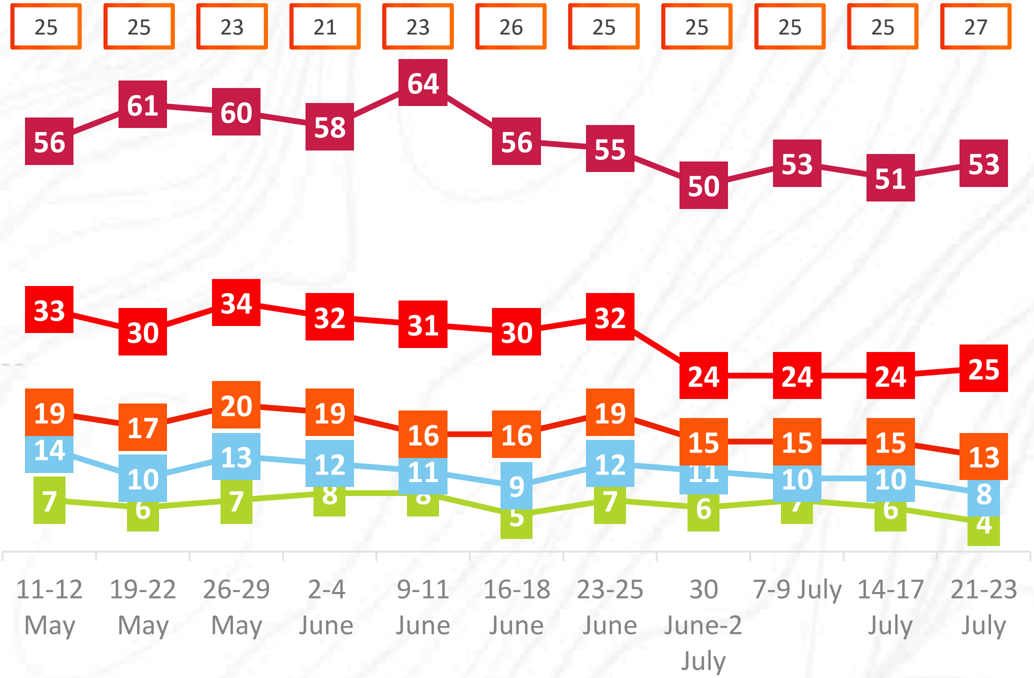
7.3

Average time **since** the activity last done

5.2

Average time **before** doing 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

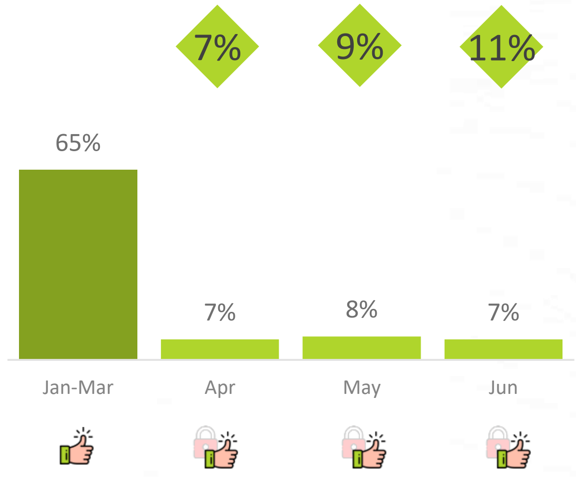
Q12. Given what you know today, when do you anticipate doing the following? Base all
Q1a. And when exactly was the last time you did the following activity/activities?

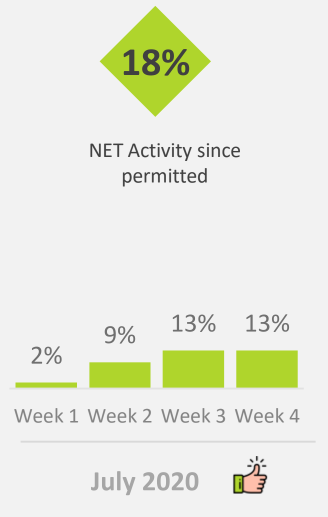
Market Recovery Tracking: Take the bus

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

After two weeks of significant week-on-week recovery for bus travel participation, this week there is a slowing of progress – both in terms of reported journeys and anticipated. Almost 1 in 5 Travel Activists has now taken a bus journey since the pandemic – compared to almost two thirds of this subset during Q1, indicating that despite the weekly progress, the road to recovery remains a long one.

Have done the activity since permitted



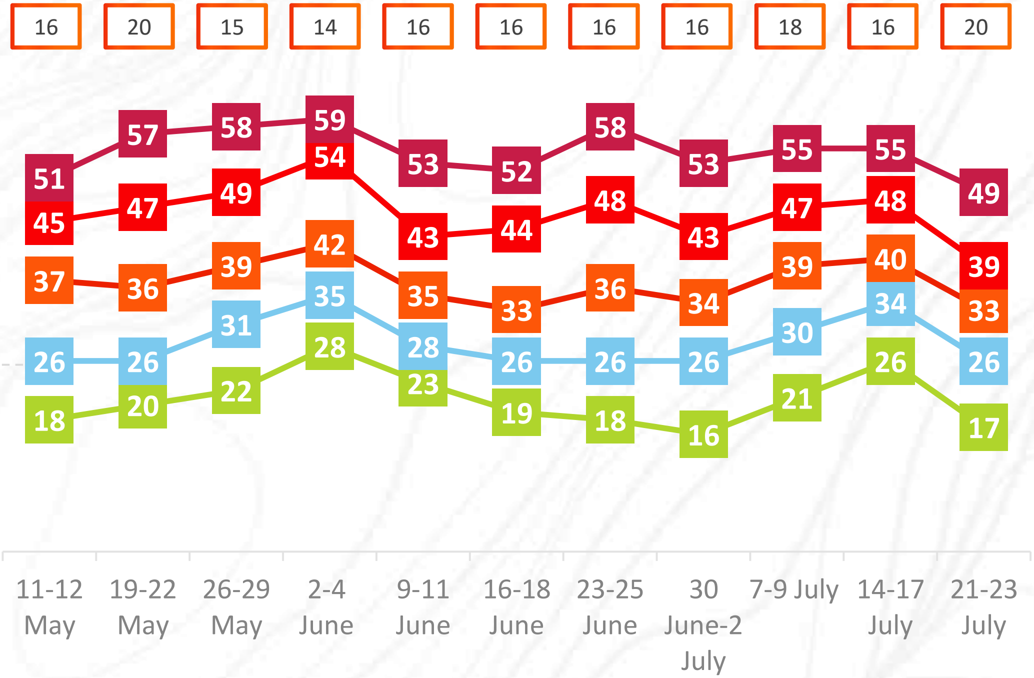


This week

4.4
Average time **since** the activity last done

2.4
Average time **before** doing 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?

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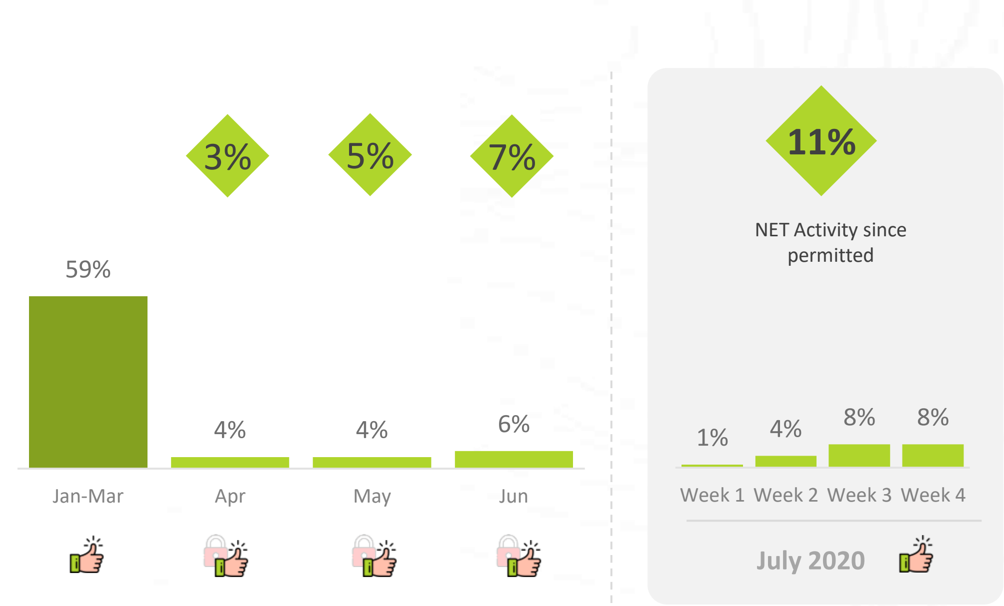
Market Recovery Tracking: Take the train

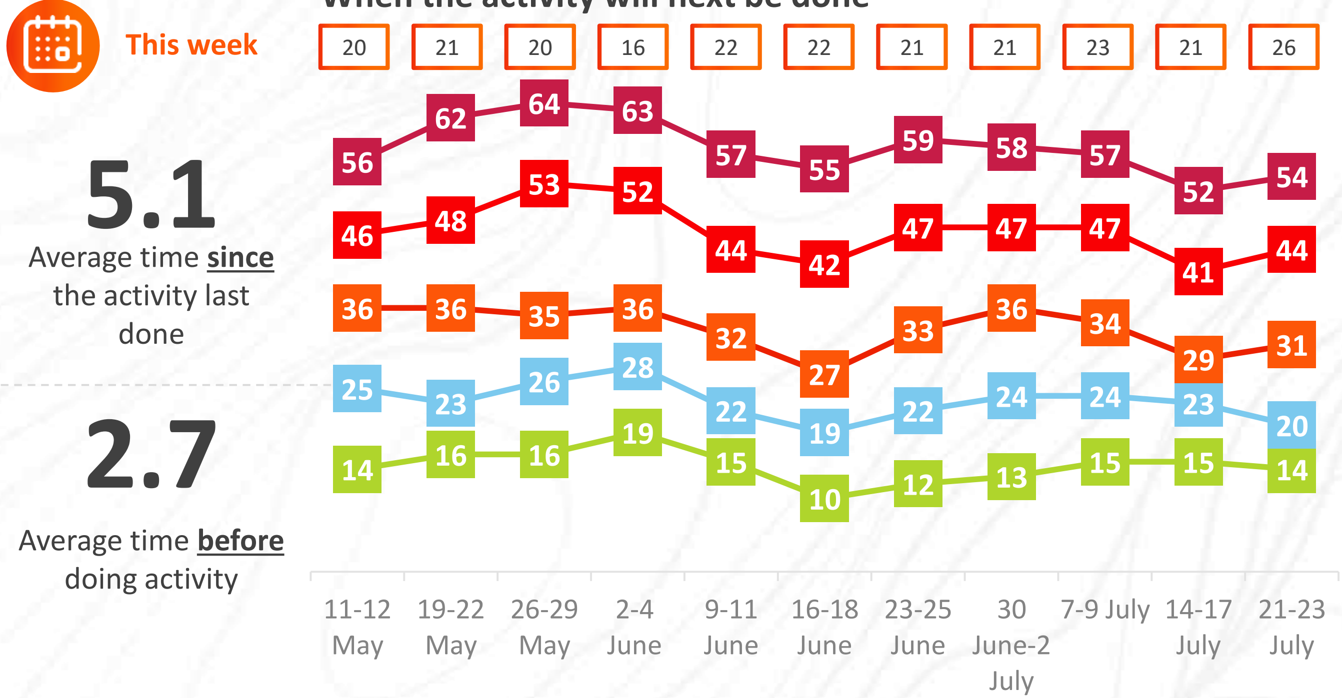
To what extent is consumer participation in each activity sector recovering to ‘normal’ levels?

While every train operating company has a different journey mix, in terms of overall demand across the UK, the London commuter market is hugely significant. With the majority of office-based companies still working remotely, demand for rail services remains heavily driven by leisure. After last week’s 4 point increase, there is only marginal progress this week.

Have done the activity since permitted



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?

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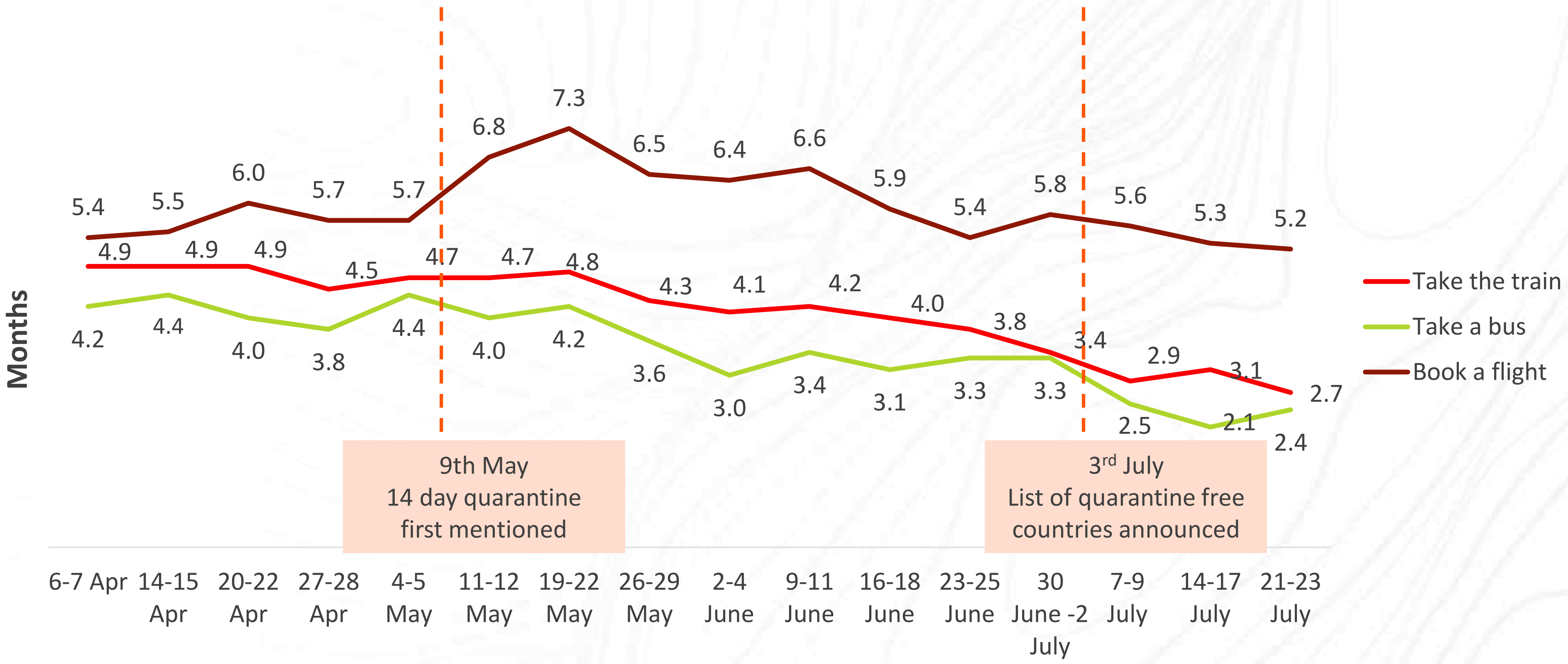
Although there is no significant recovery in rail travellers this week, average lead-time to next anticipated journey falls to its shortest time yet. For bus services, however, last week's decline in average lead-time is reversed.

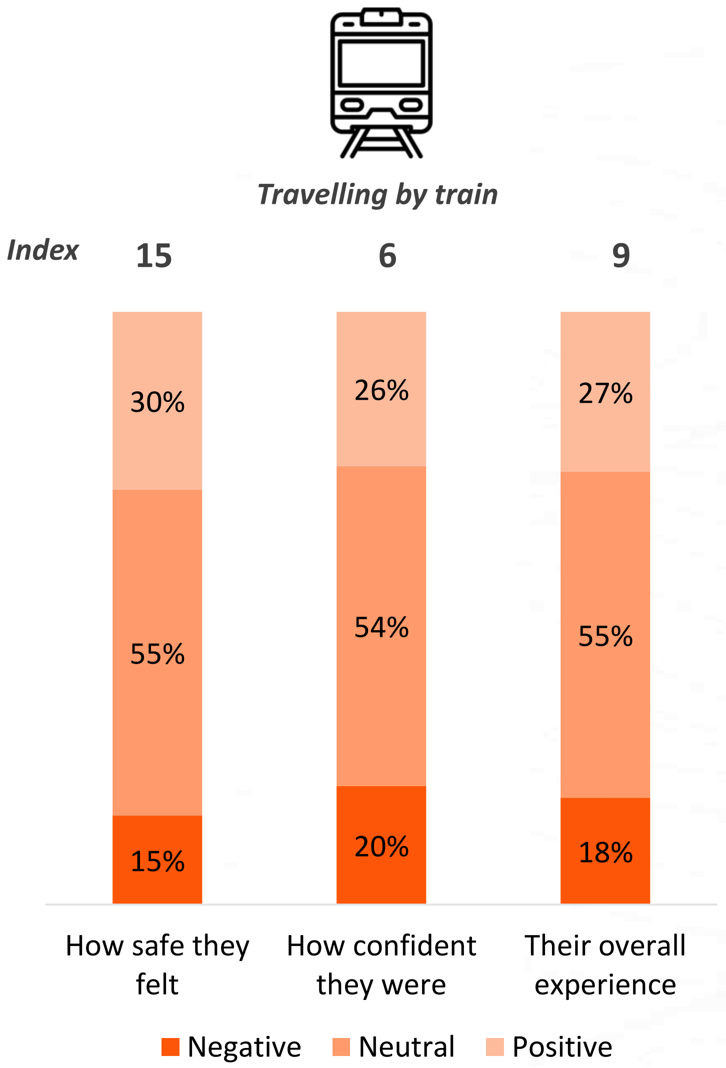
Average time before taking the bus, train and booking a fight

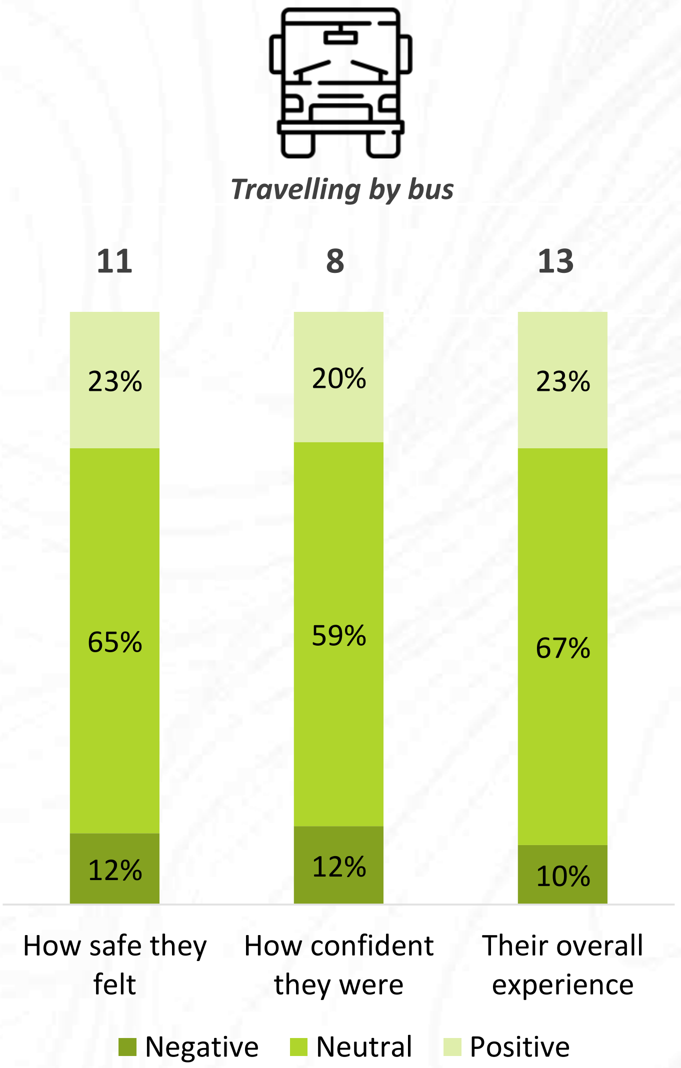


ALLIGATOR

BVA BDRC

Taking public transport: how was the passenger experience post COVID-19?





Those who have travelled on public transport since June record more positive feedback on the experience than negative.

Taking the train records a higher index (% positive - % negative) than the bus when it comes to the way passenger felt safe; but bus users were more confident overall than train passengers.

There is room to improve for both modes by ensuring passengers respect the safety rules and by promoting further the steps taken (such as the deep cleaning of the trains/bus) in order to keep passengers safe.

QTF3. You have indicated earlier that you [ACTIVITY] since June? Please rate your experience

On social media: after the UK government announced anyone could now use public transport, travellers shared their experiences. Experiences were mixed, some were happy to be back travelling again whilst other were concerned those travelling with them weren't following safety rules e.g. wearing face masks on-board.

"As travel guidance changes what now become crucial is convincing people that the railway is safe. Credit to @northernassist for launching a clear, safe travel message."

"My son caught a train this evening. At the station was a vending machine selling one face mask for £7 and one alcohol wipe £2.50. During the war they had laws and punishments for profiteering."

"This is Dave, Dave is here to keep everyone safe on this 12.02 @LNER Azuma from York to Kings Cross, Dave is wearing a face covering to protect everyone, be like Dave when on public transport and help us keep him and everyone else safe on our trains and stations. @cyberman1985"

"@AvantiWestCoast managed to sit, not at all distanced. No mask wearers, in front/behind us. These people had masks, under chin, hanging off ears or around their wrists, so very unlikely all had medical http://reasons.My gf has asthma exception pass but struggled thru wearing 1 as it is not safe"

"@TfL I have a new born sometimes I use public transport and this is unacceptable use of masks. I ask you do I call them out on this as a Londoner or do I wait for you to enforce the mask rule. Please reply if I take action on your negligence"

"@greateranglia It's so nice to be back on a train. And a new one too!"

"@c2c_Rail Appalling ! At Upminster Majority of customer without masks, no enforcement - then the contractors don't wear them properly or not at all !! Come on C2C encourage people back but mange everyone for safety !"

"@SouthernRailUK what is the point of announcing face masks must be worn over nose and mouth when I passed 4 members of your staff protecting their chin and not covering nose and mouth as required at Victoria station ! #Facecoverings"

"@WestMidRailway 1st time on a train in 4 months most passengers not wearing masks, not being policed..about 25-30 people NOT wearing masks and neither was conductor absolutely disgraceful and to top it off a needle with brown substance was found by WC - crew alerted by passenger"

"@CrossCountryUK great to be able to get a cup of tea on board this morning"

"Hooray! At last a sensible advert to encourage people back on the railways. Well done @northernassist for changing the message. Hopefully the DfT will follow soon."

"Excellent...@greateranglia has also changed its message. Perhaps next week I may take a little trip out to see what the 'new normal' looks like."

Personal finances

While coronavirus continues to impact daily life to a lesser extent, longer-term goals such a property purchases are increasingly back on the table

Chancellor Rishi Sunak recently raised the stamp duty threshold to £500,000 until 31 March next year in England and Northern Ireland, as part of plans to bolster the economy and property market. The Treasury says nine out of 10 people getting on or moving up the property ladder (or downsizing) this year will pay no stamp duty as a result. The move has been welcomed and attracted a positive response from professionals on social media. However there is doubt about the extent to which it will genuinely support those who are already struggling to raise a deposit and secure a mortgage in the current environment, particularly first time buyers.

> "A #housing market "mini boom" has gathered pace since the implementation of the **#StampDuty** holiday this month. @rightmove data shows that average asking prices climbed by 3.7% between 7 June and 11 July to reach £312,625"

> "Will the dip in rents deter would-be landlords? Or are the **#stampduty** savings too attractive? One of the trends to watch in #ukhousing this summer #property"

> "#Covid19 has hit many people hard and the #HousingMarket is one of them. Thankfully the recovery has been rather spectacular however there are still some casualties. The **#StampDuty** cut is welcome but what about those hefty #Deposits that are now required?"

> "With landlords in a position to benefit from the tax savings announced in the Chancellor's summer statement, Mortgages for Business says that property investors should not squander Rishi Sunak's surprise boost."

> "And with low interest rates, #stamp duty freeze and restrictive lending for FTBs we might well see another buy-to-let boom like that followed the GFC. Unless of course we improve renters rights and invest in social housing!"

> "Since the #StampDutyHoliday came into place, we've seen a flurry of sales activity - from increased offers, to purchasers seizing this opportunity to acquire multiple units! Great kick off to this #tax holiday!"

> "More good news for house hunters as banks bring back 10% deposit deals on mortgages!"

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The stamp duty holiday has encouraged many would-be home buyers to adapt their plans, while for a minority it has proved to be an invaluable life-line

Prior to the pandemic, 14% of the population (20% of ABC1s) originally planned to purchase a property in 2020/2021. Half of these would-be buyers are now reviewing and adapting their plans to capitalise upon the revised stamp duty threshold, including buying before the final deadline, reducing their borrowing or re-considering their budget – either expanding their horizons to include higher value options or ensuring that they remain within the £500K limit and pay no stamp duty at all.

How, if at all has the change to stamp duty affected your plans to purchase a property in 2020/2021?

53% Have now **adapted** their original plans. These include:

19% Are **unaffected** by the change: they would **go ahead** with their plans regardless

14% Are **unaffected** by the change: they have had to **postpone or abandon** their plans anyway

11% Believe that their plans have been **rescued** - they would not otherwise be able to proceed

1. 17% have brought their plans forward, to meet the March 31st 2021 deadline
2. 17% are now able to consider higher value properties
3. 12% are reducing borrowing from family / friends
4. 10% are looking at lower value properties, below the £500K threshold
5. 9% plan to reduce their mortgage

Q74 Prior to lock down did you plan or were you seriously considering buying a residential property in England or NI? Base all: 500
Q76 How, if at all, have the changes to stamp duty affected your plans? Base: all planning to purchase (82)

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As expected by market commentators, the level of impetus created by the stamp duty revisions varies by buyer type with home movers most likely to benefit

Home movers are more likely to have had their plans rescued altogether, while many first time buyers and those looking for shared ownership have had no choice but to put their plans on hold anyway. For some FTBs the challenge of raising a deposit and securing a mortgage is simply too much of a stretch, particularly in the current environment, and one that the stamp duty concession cannot overcome.

How, if at all will the stamp duty changes affect your plans to purchase a property in 2020/2021?
Top 3 expectations across 3 buyer types – indicative due to base sizes

FIRST TIME BUYER

1	**Unaffected**: have had to postpone or abandon plans anyway
2	**Unaffected:** will go ahead regardless
3	**Adapted:** will get a smaller mortgage

SHARED OWNERSHIP

1	**Unaffected:** have had to postpone or abandon plans anyway
2	**Adapted**: bringing plans forward
3	**Unaffected:** will go ahead regardless

HOME MOVER

1	**Unaffected:** will go ahead regardless
2	**Adapted**: now looking at higher value properties
3	**Rescued:** couldn't otherwise go ahead

Q74 Prior to lock down did you plan or were you seriously considering buying a residential property in England or NI? Base all: 500
Q75 Which of the following were you planning or seriously considering? Base: all planning to purchase (82)
Q76 How, if at all, have the changes to stamp duty affected your plans? Base: all planning to purchase (82)

Appendix

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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Methodology

Survey of Consumers

Nationally representative online survey, conducted weekly. This week we surveyed 1,761 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:

- 25,209 posts for the transport sector
- 12,524 posts from the leisure sector
- 8,830 posts from the hospitality sector
- 22,746 posts from the financial sector

Contact

Matt Costin
Managing Director
07875 685 838
Matt.costin@bva-bdrc.com

Caroline Ahmed
Director
07919 383 728
Caroline.ahmed@bva-bdrc.com

James Bland
Director
07772 605 303
James.bland@bva-bdrc.com

Tim Sander
Director
07989 165 658
Tim.sander@bva-bdrc.com

Jon Young
Director
07980 712 563
Jon.young@bva-bdrc.com

Max Willey
Director
07875 148 051
Max.willey@bva-bdrc.com

Thomas Folqué
Associate Director
0207 490 9139
Thomas.folque@bva-bdrc.com

Alice Wells
Research Executive
0207 490 9130
Alice.wells@bva-bdrc.com

Hannah Smith
Junior Research Executive
0207 490 9166
Hannah.smith@bva-bdrc.com

Suzy Hassan
Managing Director
07795 662 548
Suzy@alligator-digital.com