Tracking Consumer Sentiment on the Impact of COVID-19

Travel & Mobility, Leisure & Hospitality, Personal Finances

Weekly Update – 12th August 2020

BVA BDRC ALLIGATOR

Introduction

You wouldn't know to look at our average mood (the spirit of "keep calm and carry on" is perhaps not dead) but as a nation we were less upbeat last week than we were the week before. Nearly nine in ten of us now concede that a second wave and lockdown are likely, and for the first time in months, more of us now think *the worst is still to come* than do not. The "Boris Bounce" we saw just after he predicted normality by Christmas has proved to be just a blip, and although restaurants are currently enjoying the summertime generosity of the Chancellor of the Exchequer, those employees whose jobs have been dependent on the very same are all too aware that the deepness of his pockets is not without limit. Add to that the fact that quarantines and local lockdowns are popping up regularly and you can understand why, below the surface, we might not be quite as happy as we make out.

It might just be the heat, of course, making it hard to concentrate, but as I sit here, melting at my keyboard, I find my mind wandering ahead to when the weather starts to cool down. At the moment we're fortunate enough to be able to spend a lot of time outdoors but when that changes what sort of impact might we see? Half an hour ago the news broke that the UK had entered recession, shedding 20% of GDP in just one quarter and forever changing the y-axis on charts and graphs at economic and media outlets nationwide. If that happened when furlough was supporting jobs and the weather was good, what is quarter 4 going to bring?

I think I may just check on the progress of vaccine development and contribute further to the five-fold increase in that word as a search term since March. Et voila, from the strangest of places, encouragement arrives. Not from my search results though (unless Russia's vaccine prove successful). No, my curiosity got the better of me while researching that little search-term statistic, and it turns out that searches for the word "hotel" in the United Kingdom finally returned to a level approaching 'normal' this week. Intentions to book may well be weak, and the less said about present occupancy the better, but if we're looking again that has to be a positive thing, right?

And that's what it all comes down to. Our whole economic system is based on confidence and paranoia. Whichever has the upper hand at any given time determines the outcome over the next few months. I think it's time we heard from Rishi again - a bit of good news would be very welcome indeed. For those of us hoping to attract guests back through our doors (or into our gardens), safety success stories seem a sensible strategy to me.

Stay tuned and stay safe!

Matt Costin
Managing Director, BVA BDRC

Suzy Hassan
Managing Director, Alligator Digital

Executive Summary

Still back down to earth

Last week we reported that the proportion of adults who believed the worst had passed had reached its lowest level since April. This week's section of the summary could well be a copy/paste job because a further drop means that proportion is now just a third of the high it achieved in May. Also this week, the proportion thinking the worst is still to come jumps 11 percentage points to 51%. The line for this measure is starting to resemble the rolling seven day average line on the UK Government's published 'confirmed cases' chart – perhaps there's something in that. Perhaps, though, the re-imposition of quarantine measures to some international arrivals has suppressed our optimism too.

Eating out and helping out

"Dishy Rishi" does seem to have provided a shot in the arm to UK restaurants by picking up half the bill for us. Even among the most concerned of segments, the growth in the proportion who have been to a restaurant since June accelerates in the first week of August. There are also increases in shopping trips, visits to the pub and usage of domestic public transport, but overseas holidays and travelling by plane remain stubbornly low.

Our intentions reflect our mood

There are drops in intentions across pretty much the entire spectrum of activities covered with the notable outliers being the pretty static "go to an outdoor park or scenic area" and the aforementioned "go to a restaurant", which sees continued growth in the level of intention to visit by the end of August – it's now at 62% of travel activists. The indoor activities seem most affected – and with news of increased case numbers in the UK, that's hardly surprising.

Brakes applied in the transport sector

It has been a bit of a subdued week for the travel sector, with intentions dropping across the board – albeit with the shortest lead-time we've yet seen for taking the bus. The journeys that involve spending a long time in a confined space are obviously less attractive and until thinking around that changes we're perhaps unlikely to see huge appetite for those travel media. The quarantine on international arrivals from Spain has almost certainly a driver of the decline in intentions to fly and we see new record low for train intentions by the end of the year.

The jury's still out on self-service in banks

Although more tend to agree with the idea that self-service is safer than disagree, the sentiment is not yet overwhelming and about a third of adults are still undecided. The "Life goes on" segment of adults is least convinced of the potential for self-service as a form of spread prevention. There appears, therefore, to be a large proportion for whom additional persuasion will still be required if increased adoption of self-service is the aim.

Contents

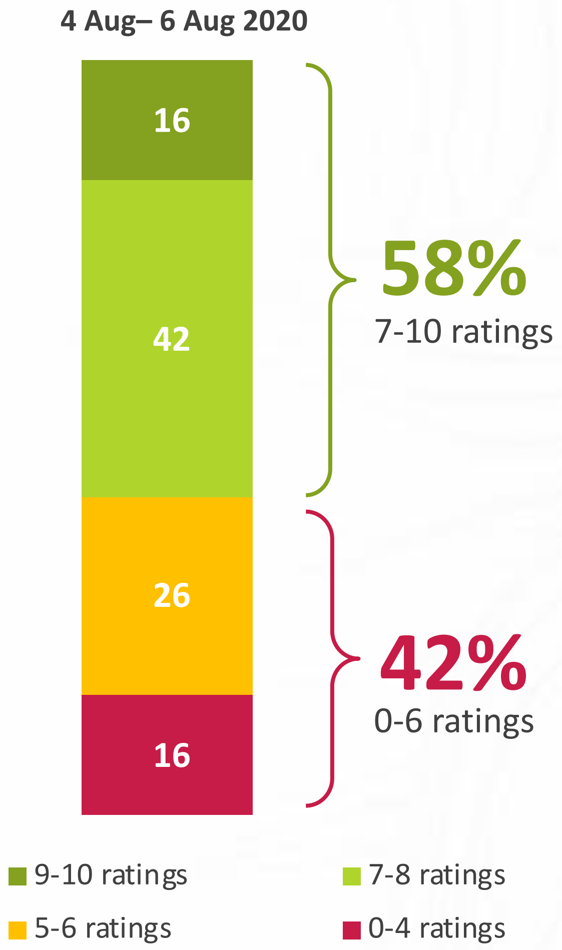
The mood of the nation

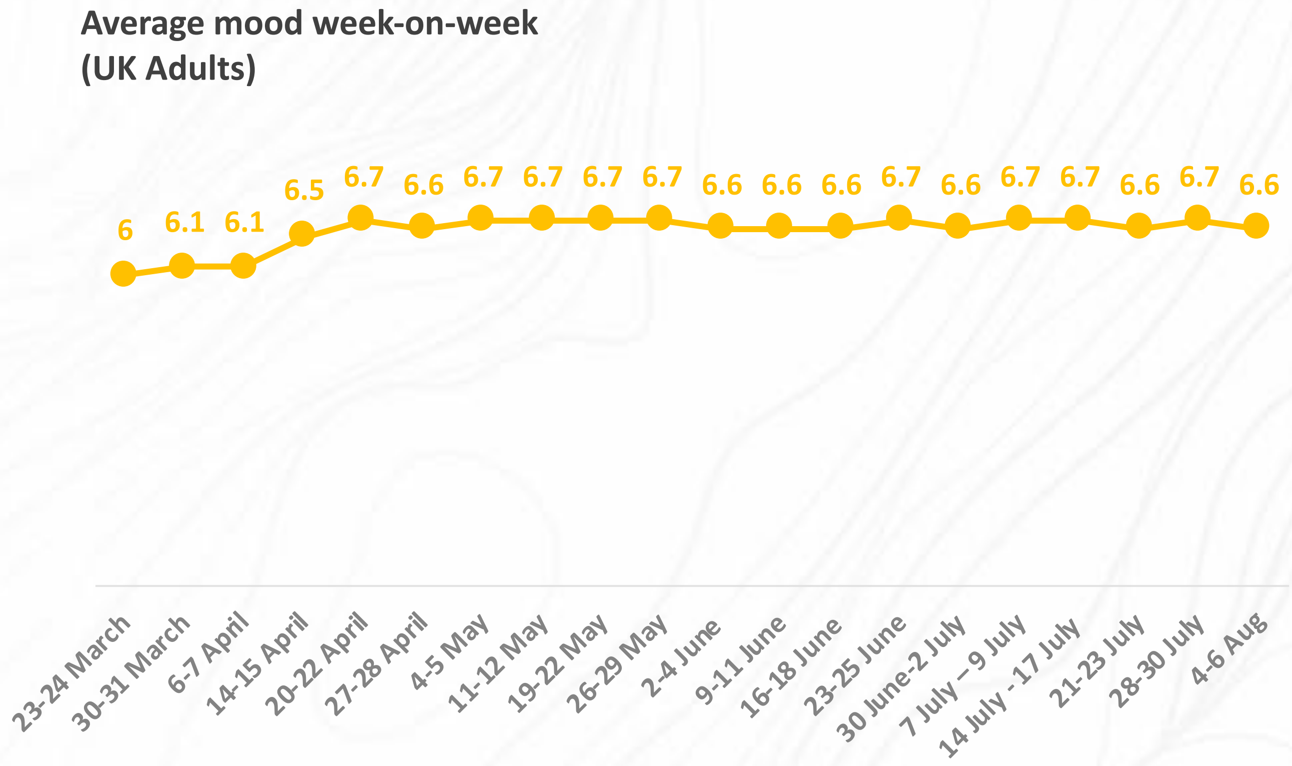
Our average national mood remains relatively stable – on a 10pt scale, it's been either 6.6 or 6.7 since late April...

4 Aug– 6 Aug 2020

Average mood

6.6



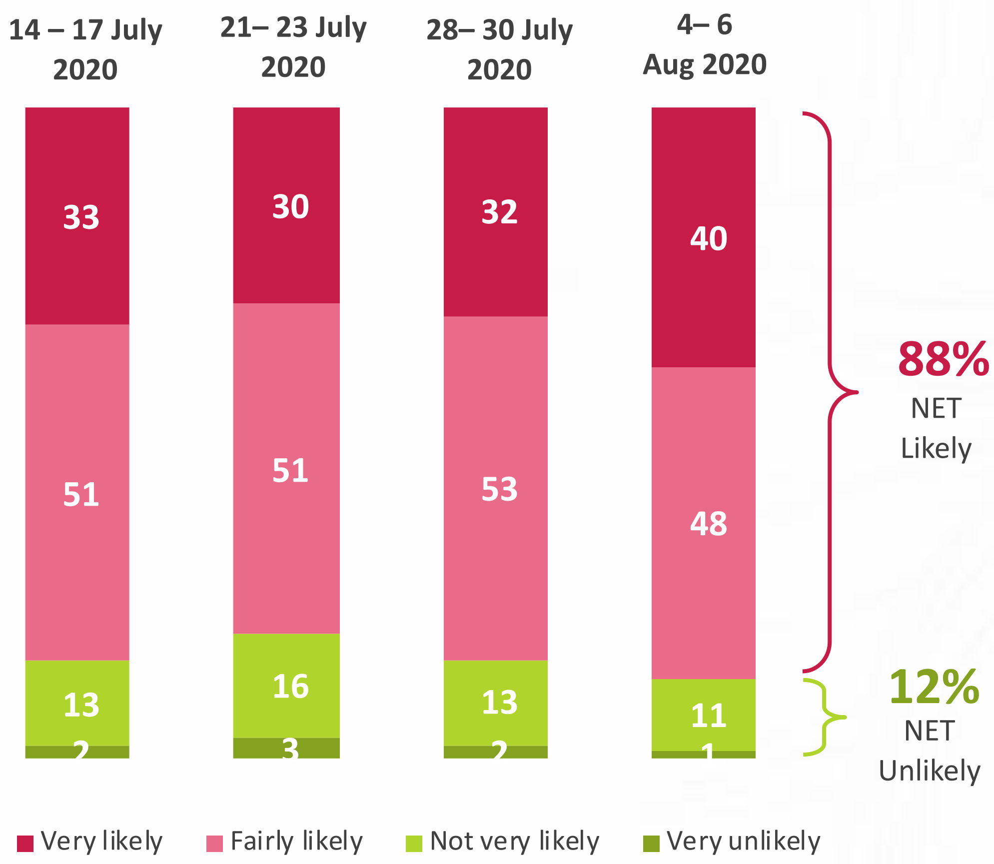


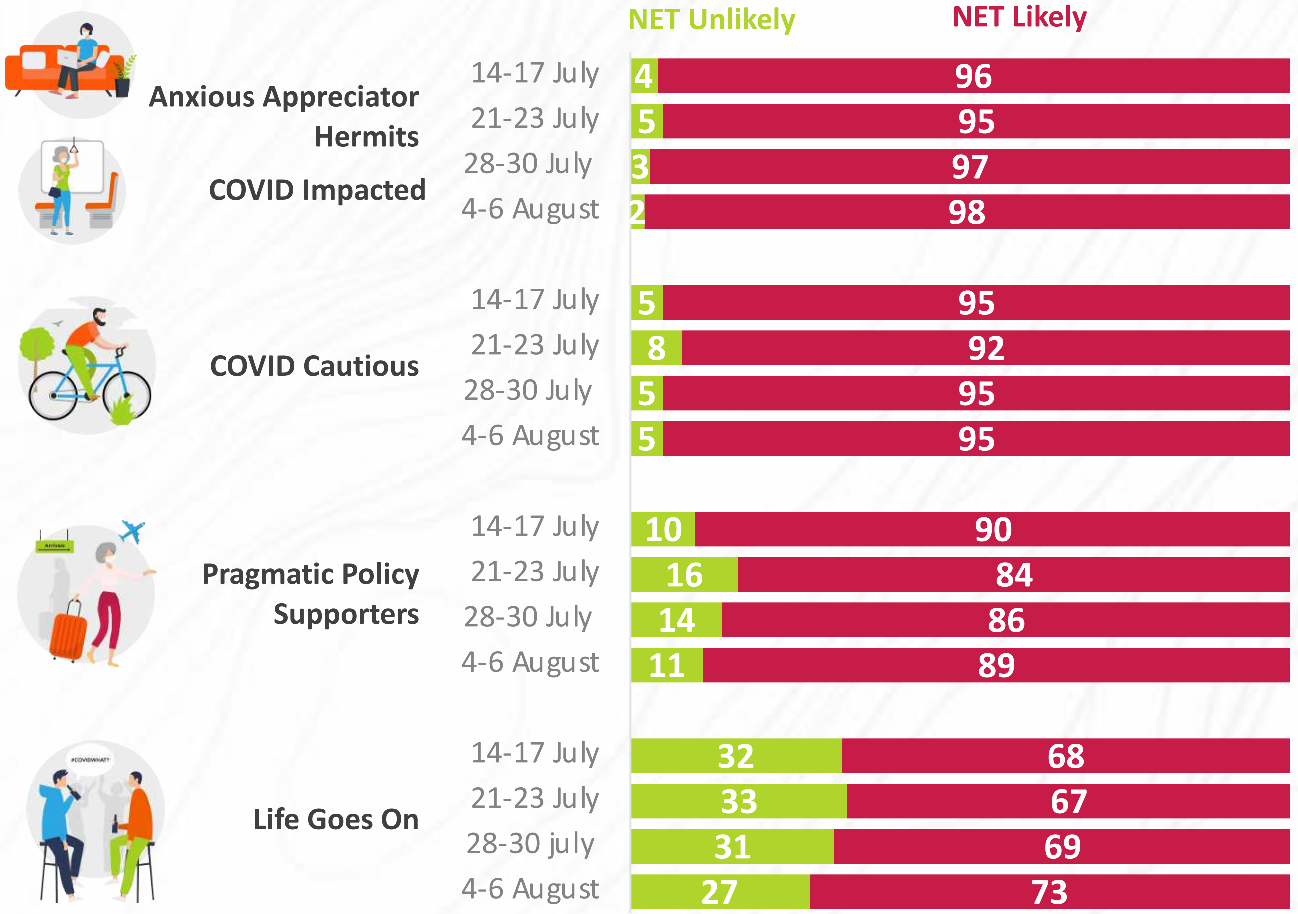
Q5: How would you rate, between 0 and 10, your mood today? (%)

But with the UK's 7-day average case numbers creeping up, fears of a 2nd wave / lockdown rise to a point where 4 in 10 consider it to be very likely…

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

All UK Adults: Week-on-week

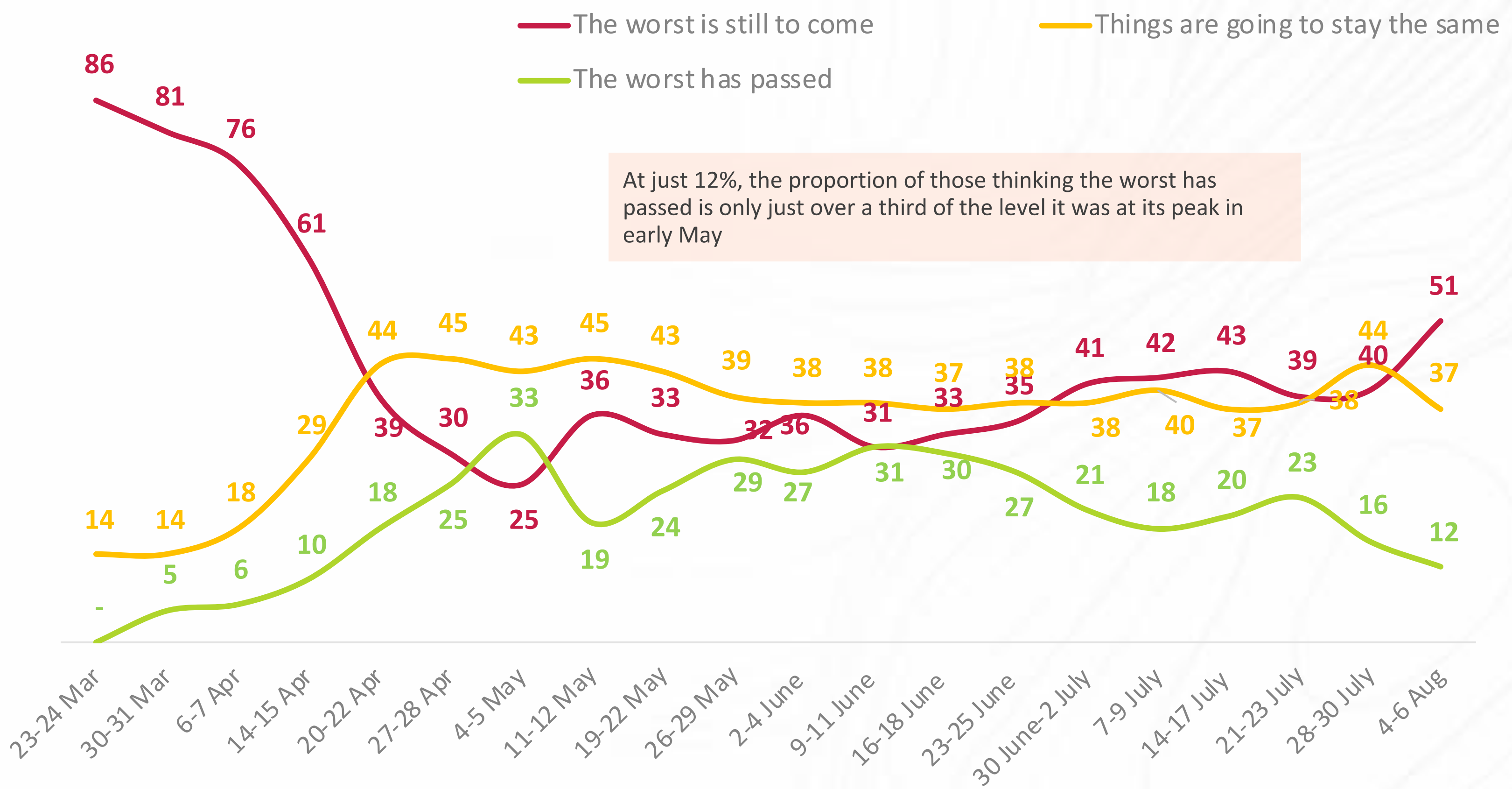




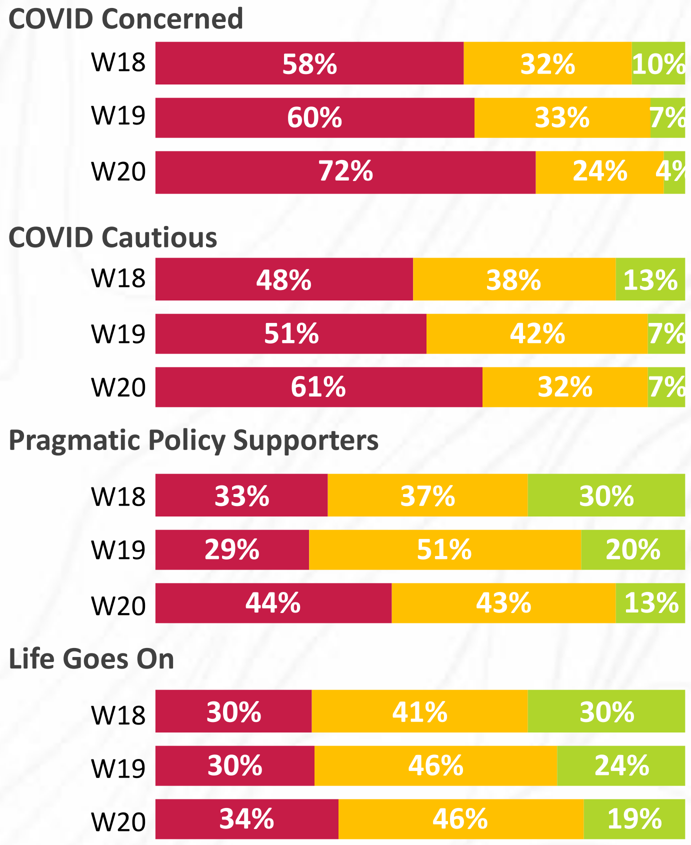
There has even been a increase in the "Life Goes On" segment – nearly three quarters of this most optimistic of groups now think it is likely to happen

Q69: How likely or unlikely do you think it is that the UK will experience a second wave of coronavirus that will lead to a new lockdown?

Once again, more than half of us think the worst is still to come, the first time since mid-April that we have been anything like this pessimistic.

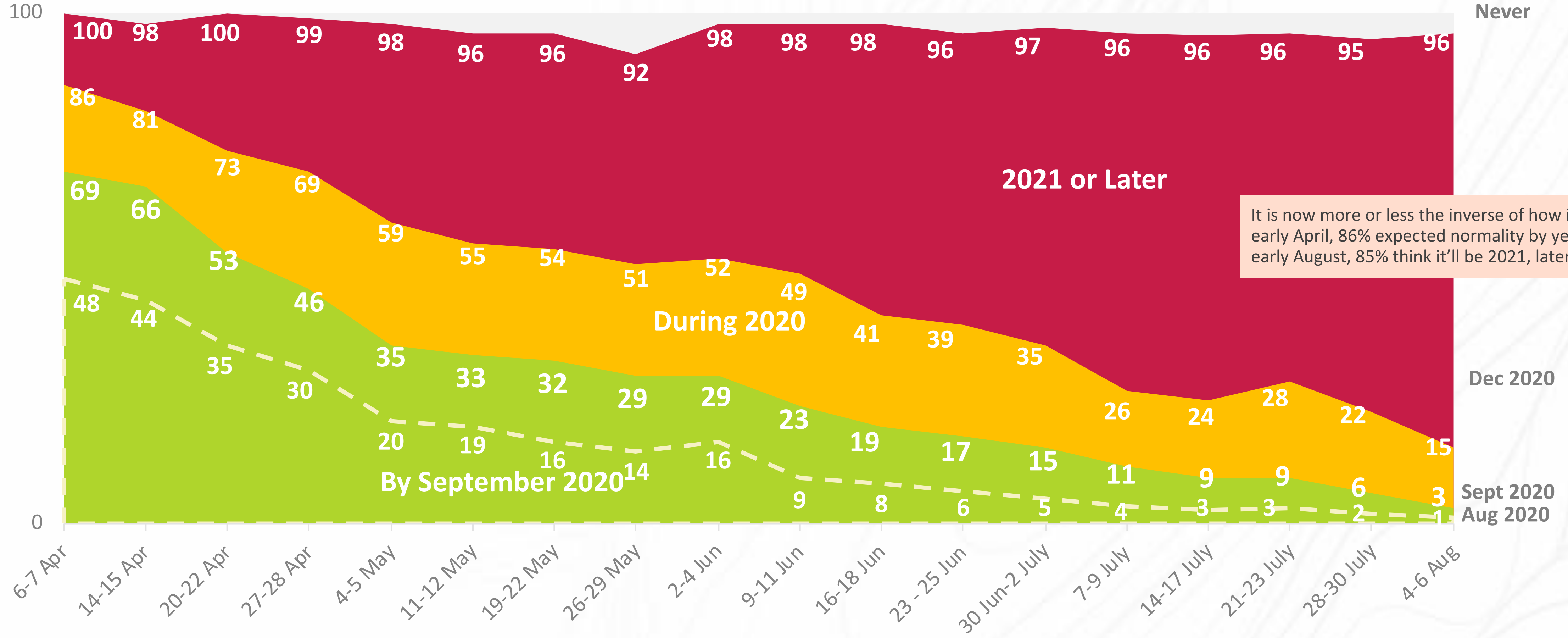


Notable increases in negativity across all segments, but perhaps most dramatically among the pragmatic policy supporters



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? (%)

Correspondingly, the proportion expecting normality by the end of the year continues to drop.

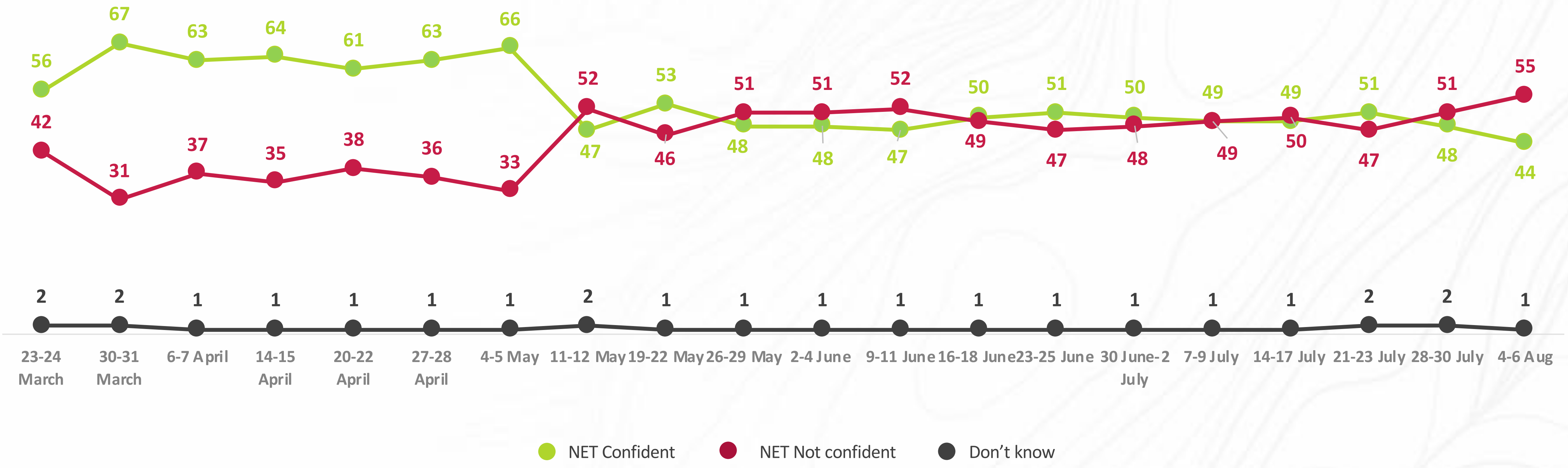


It is now more or less the inverse of how it started. In early April, 86% expected normality by year-end. In early August, 85% think it'll be 2021, later or never!

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

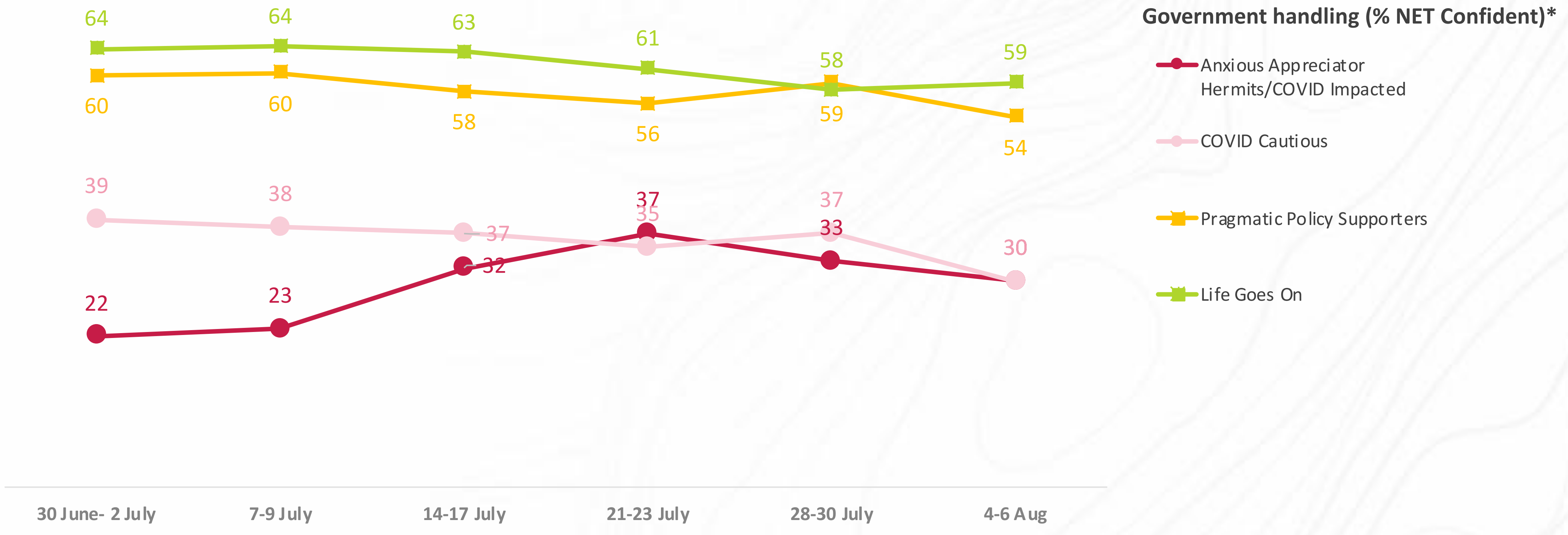
With a more negative outlook comes a decrease in confidence in the UK government's handling of the crisis, dropping to its lowest level since start of tracking.

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



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

The decline in confidence in the UK government is not restricted to the most cautious segments: Pragmatic Policy Supporters (who include a high incidence of people of retirement age) are less supportive this week.



*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? (%)

From social media: key themes underlying positive and negative sentiment

I was amazed how well Center Parcs have adapted the village and public areas to adhere to social distancing and restrictions. I felt completely safe. Also have to say the site was immaculate!

Safe customer experience

Very cool move by Uber introducing the Uber-Thames Clippers collab! #pivot #transport_ideas #london

Innovation

American Express shop small incentive is so great!! I will be purchasing more croissants and coffees this week 🥐☕ #ShopSmallUK

#Supporting struggling industries

Queue of 200m to get into @kewgardens today. Great news - Suggests people are really engaging with attractions, and are actually turning up too!

Rise in demand

We were only supposed to leave two hours ago and the refund is all back on the credit card already. Well impressed with @TUIUK

Positive customer experience

@VirginAtlantic I do not accept that it takes you 120 days to pay a refund to a passenger who's flight you have cancelled. No other airline finds it necessary to take this long. Even Ryanair & EasyJet known to treat customers with contempt are 50 days quicker. You are a disgrace.

'Forgotten' customers

Thank you @British_Airways & @Newquay_Airport & @HeathrowAirport for providing such a safe, comfortable & swift travel experience to & from #Cornwall this wkend!

Safe customer experience

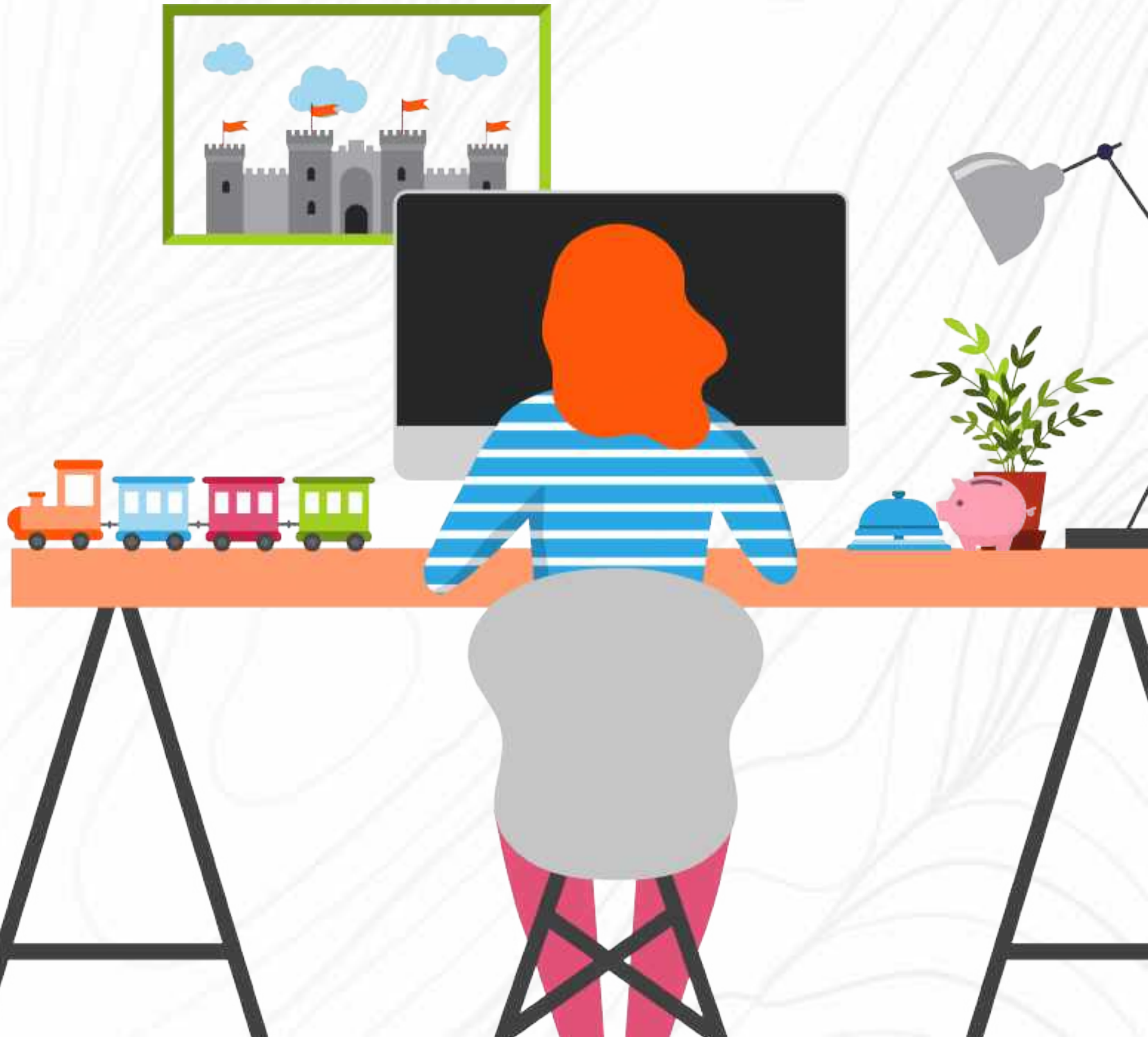
Hey @Eurostar you seem to have sat me directly opposite and beside two other passengers. Quite a few other passengers are in the same situation. I'm fairly certain this isn't in line with the current guidelines.

Ineffective rule enforcement

Why not Eat In to Help Out?
Why can't this scheme apply to takeaways?
Less risk of virus transmission and still benefits businesses Exploding head

'Forgotten' businesses

Tracking recovery across key segments



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Introducing our COVID-19 Consumer Segments

COVID Concerned

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

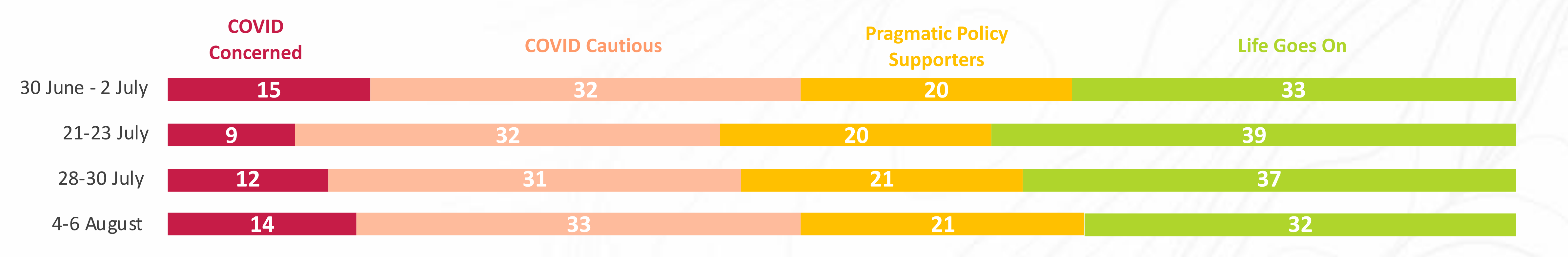
While they are less concerned about the impact of the pandemic on themselves, this segment fears that we may not yet be past the worst and would prefer a longer lockdown. They are likely to be cautious in their own post-lockdown behaviour.

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.



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

We see a step change in leisure activity this week suggesting the government's 'Eat out to help out' scheme is effectively driving business across the segments.

The most notable increases are seen in the incidence of those who have now dined in a restaurant since the lifting of lockdown.

	Segment (size)		COVID Concerned (14%)	COVID Cautious (33%)	Pragmatic Policy Supporters (21%)	Life Goes On (32%)
Jan-Mar 2020	Went to a restaurant		46%	42%	43%	33%
	Went to a pub		36%	33%	33%	27%
	Went to a shopping mall/ shopping trip		43%	35%	37%	25%
Since June 2020	Went to a restaurant	7-9 Jul	1	1	2	4
		14-17 Jul	2	4	7	9
		21-23 Jul	4	6	11	11
		28-30 Jul	6	9	14	14
		4-6 Aug	9	18	19	21
	Went to a pub	7-9 Jul	1	2	2	3
		14-17 Jul	3	6	7	10
		21-23 Jul	4	8	9	15
		28-30 Jul	8	10	12	16
		4-6 Aug	10	14	17	19
	Went to a shopping mall/shopping trip	7-9 Jul	7	6	8	7
		14-17 Jul	11	12	15	15
		21-23 Jul	11	14	15	18
		28-30 Jul	12	16	21	19
		4-6 Aug	15	18	26	21

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

UK holidays and use of paid accommodation continues to edge upwards across all segments, but there is little movement in overseas trips.

	Segment (size)	COVID Concerned (14%)	COVID Cautious (33%)	Pragmatic Policy Supporters (21%)	Life Goes On (32%)
Jan-Mar 2020	Went on UK holiday	6%	7%	8%	8%
	Went on overseas holiday	5%	8%	8%	7%
	Stayed in paid for accommodation	14%	14%	13%	11%

Since June 2020		COVID Concerned (14%)	COVID Cautious (33%)	Pragmatic Policy Supporters (21%)	Life Goes On (32%)
Went on UK holiday	7-9 Jul	0	1	1	1
	14-17 Jul	0	2	2	2
	21-23 Jul	1	3	4	3
	28-30 Jul	2	3	4	4
	4-6 Aug	3	4	6	6
Went on an overseas holiday	7-9 Jul	0	0	0	0
	14-17 Jul	0	0	0	1
	21-23 Jul	0	0	0	1
	28-30 Jul	0	1	0	1
	4-6 Aug	0	1	1	1
Stayed in paid for accommodation	7-9 Jul	0	0	1	1
	14-17 Jul	0	1	2	2
	21-23 Jul	1	1	3	3
	28-30 Jul	1	2	3	3
	4-6 Aug	1	3	4	4

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

Overseas travel may have faltered, but plane travel has increased for COVID Cautious and Pragmatic Policy Supporter segments. Use of buses and trains is fairly consistent across segments.

Jan-Mar 2020

Segment (size)	COVID Concerned (14%)	COVID Cautious (33%)	Pragmatic Policy Supporters (21%)	Life Goes On (32%)
Travelled by bus	30%	27%	24%	22%
Travelled by train	25%	24%	18%	20%
Travelled by plane	8%	10%	9%	9%

Since June 2020

Segment (size)		COVID Concerned (14%)	COVID Cautious (33%)	Pragmatic Policy Supporters (21%)	Life Goes On (32%)
Travelled by bus	7-9 Jul	5	5	5	5
	14-17 Jul	11	10	9	11
	21-23 Jul	13	11	10	13
	28-30 Jul	13	11	13	13
	4-6 Aug	14	11	17	15
Travelled by train	7-9 Jul	2	2	1	3
	14-17 Jul	4	4	3	6
	21-23 Jul	4	6	6	7
	28-30 Jul	5	6	6	7
	4-6 Aug	7	7	7	8
Travelled by plane	7-9 Jul	0	1	0	0
	14-17 Jul	0	1	0	1
	21-23 Jul	0	1	0	2
	28-30 Jul	0	1	1	2
	4-6 Aug	0	2	2	2

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

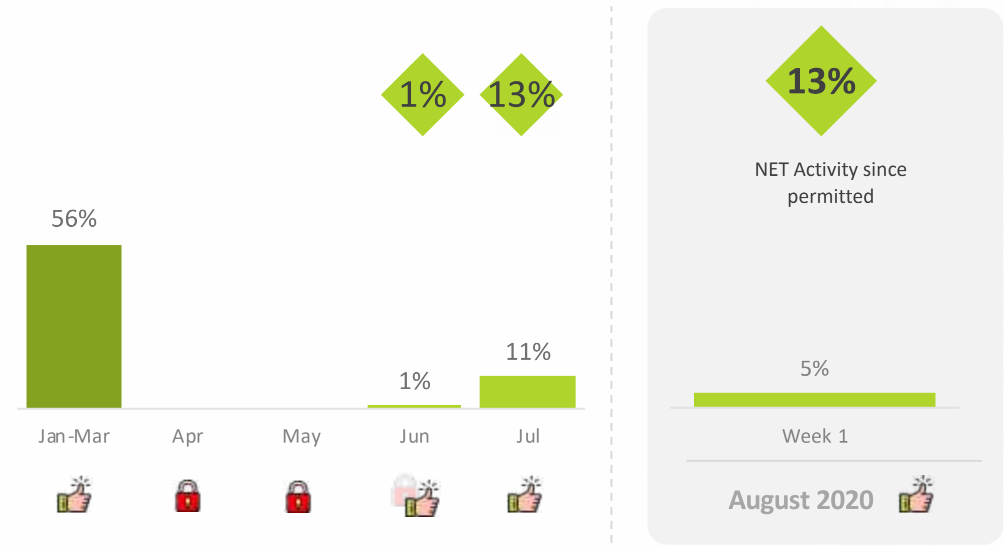
Travel and leisure

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?

While forward intentions in relation to attraction visits decline for the second consecutive week, this is likely partly to be a reflection of the fact that many have now made their planned visit – with 5% of Travel Activists saying that they have done so in the first week of August.

Visited a visitor attraction since permitted

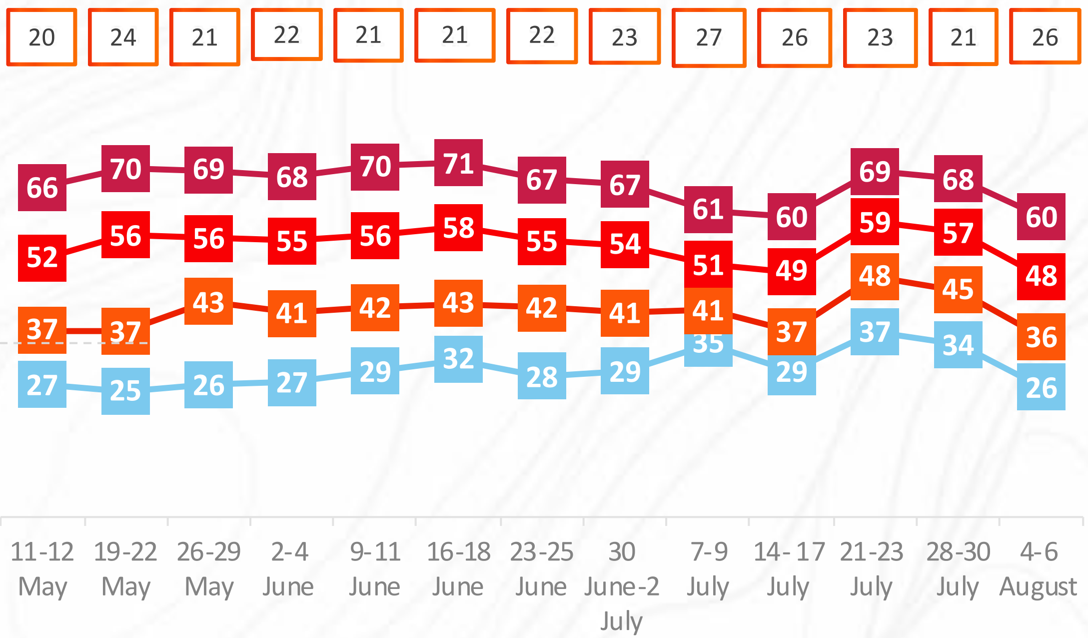


This week

5.8
Average time **since** the activity last done

2.7
Average time **before** doing activity

When the activity will next be done

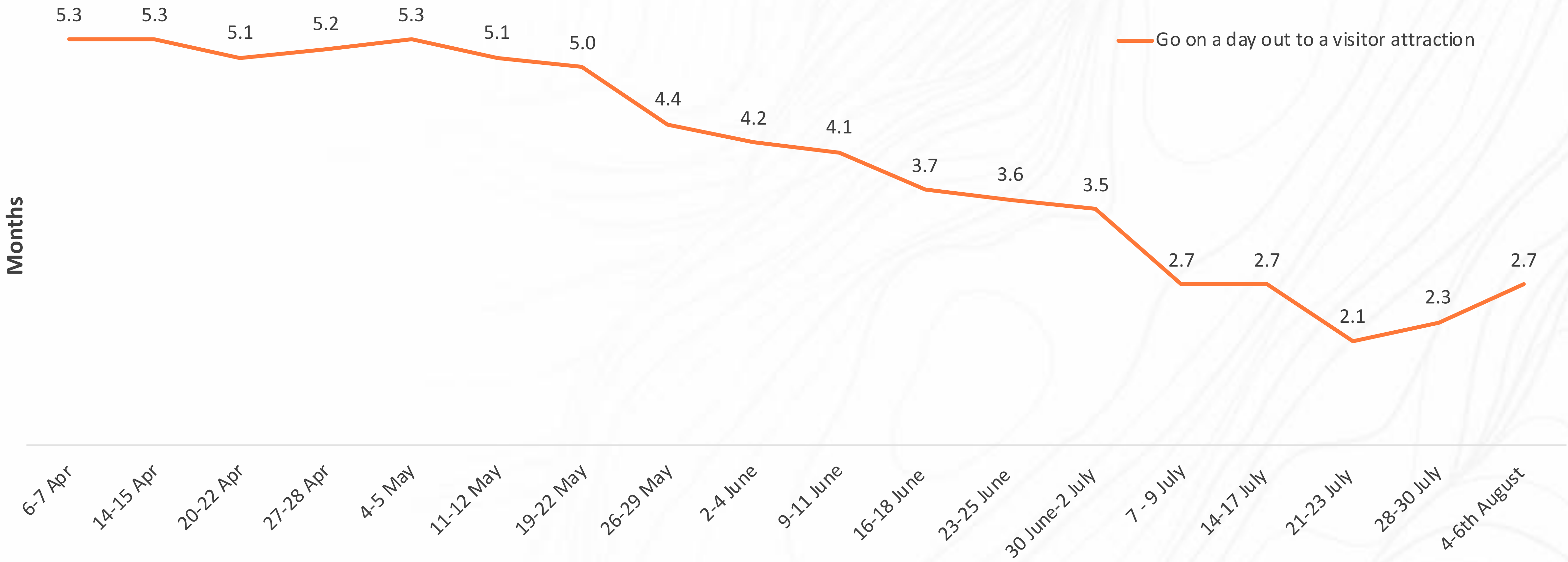


% NET participation since pandemic / activity permitted
Activity is not permitted
Activity is permitted

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?

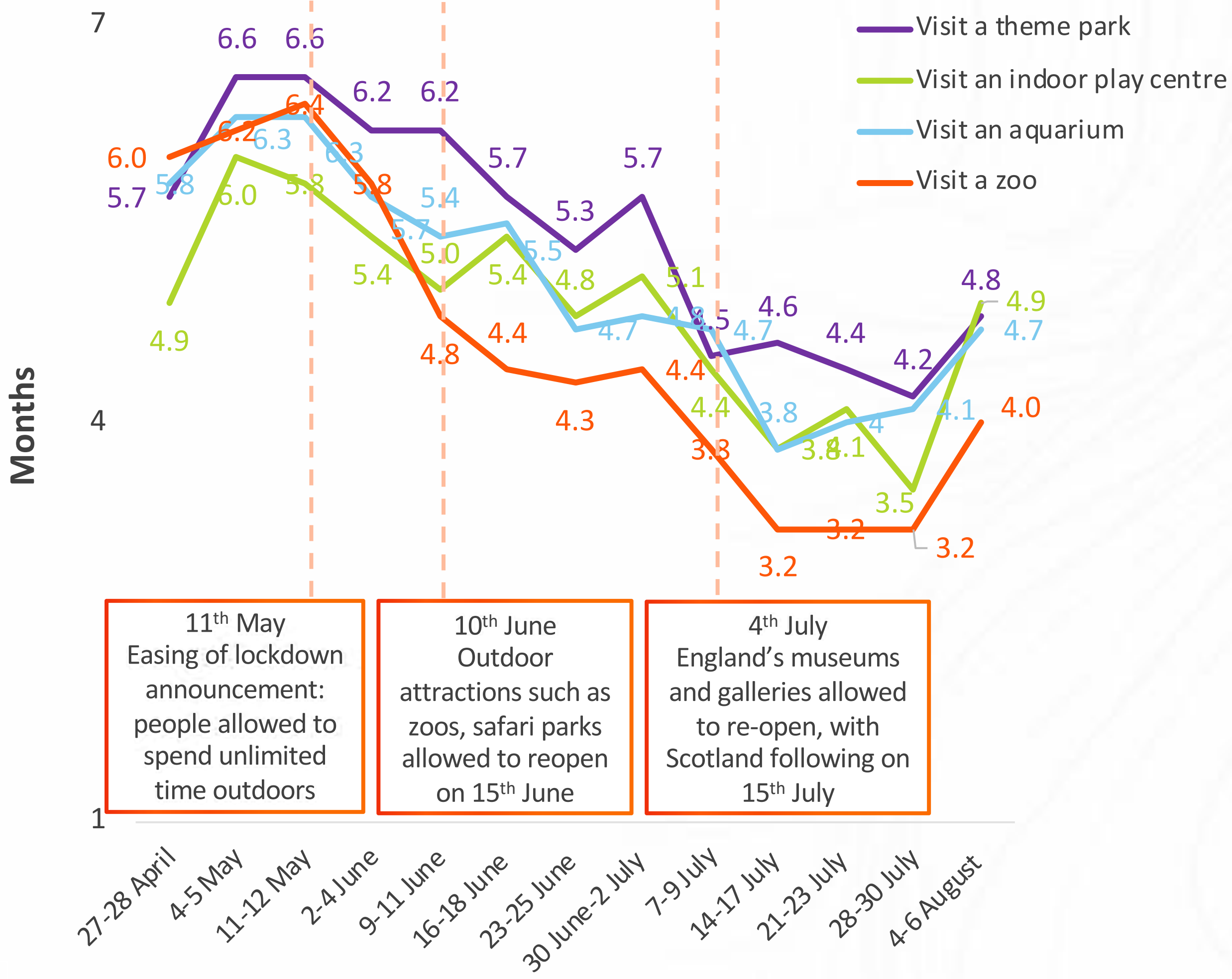
Average anticipated lead time to next attraction visit lengthens for the 2nd consecutive week. As we move further into the summer holiday period, this will be partly driven by the fact that many have now taken their intended visit.

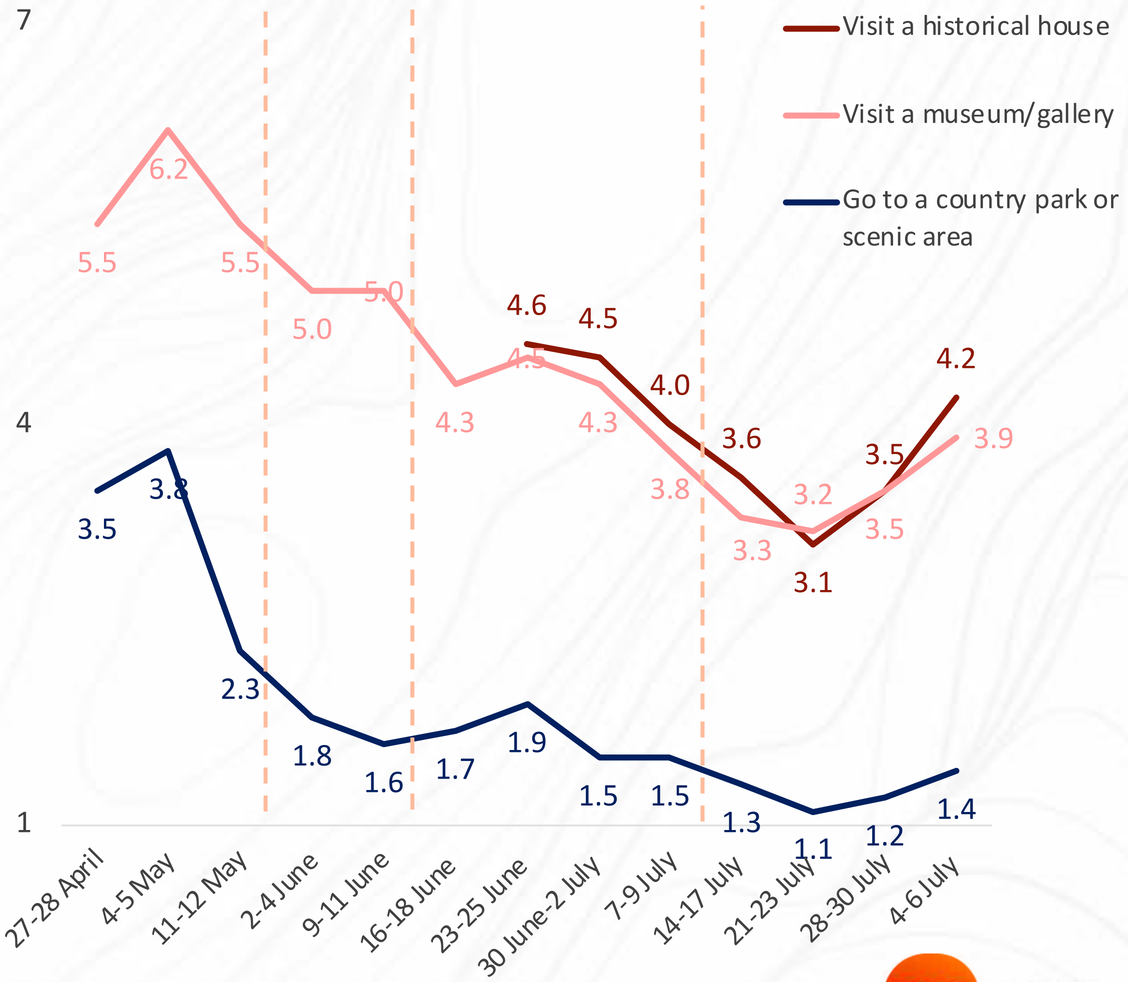
Average time before undertaking leisure activities



The lead time for visiting all types of attractions increased this week, with country parks or scenic areas seeing an increase for the first time since late June

Average time before undertaking leisure activities



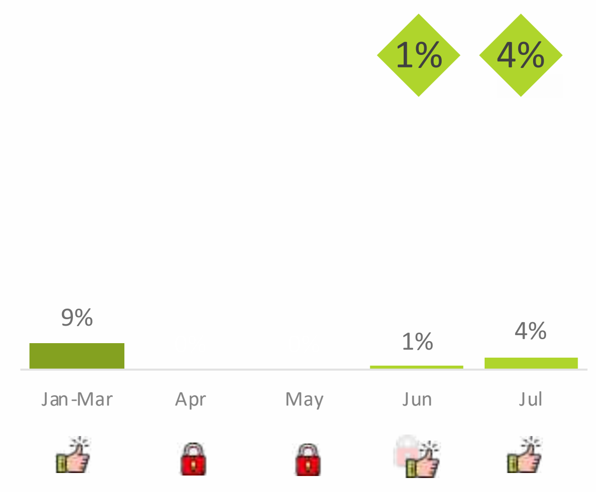


Market Recovery Tracking: Visit a zoo

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 dropped back for the second consecutive week in a row to 16%. Zoos are continuing to encourage public support with creative fundraising campaigns and appeals from a wide range of the public figures, from Olympians to comedians. Furthermore, many are applying to the Government Zoo animals fund.

Visited a zoo since permitted



This week

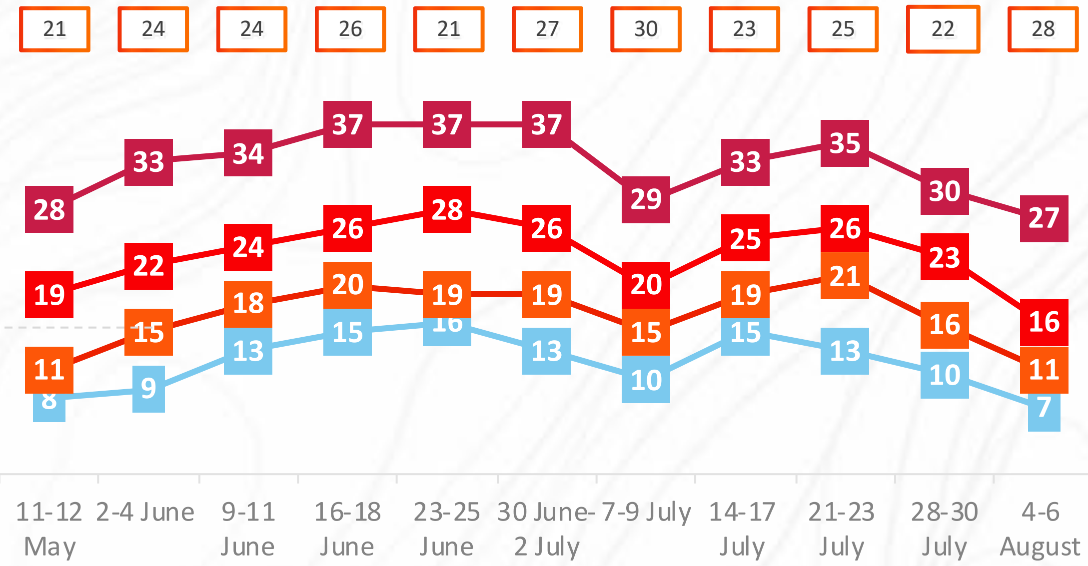
7.8

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

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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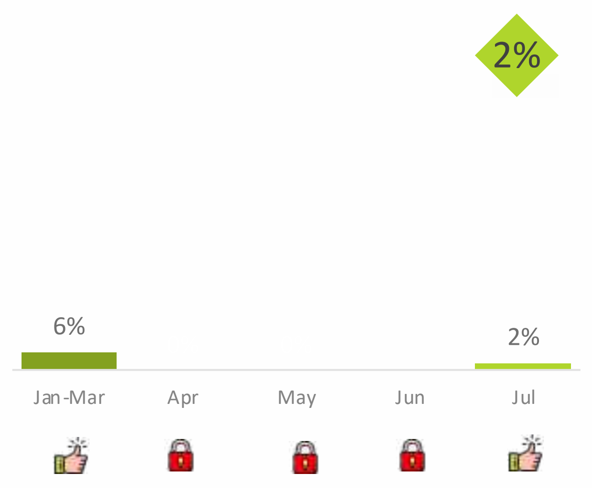
Market Recovery Tracking: Visit an aquarium

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

We see intentions to visit an aquarium before the end of this year drop from 14% to 10%, with the proportion who have visited since being permitted remaining at 2%.

Visited an aquarium since permitted



This week

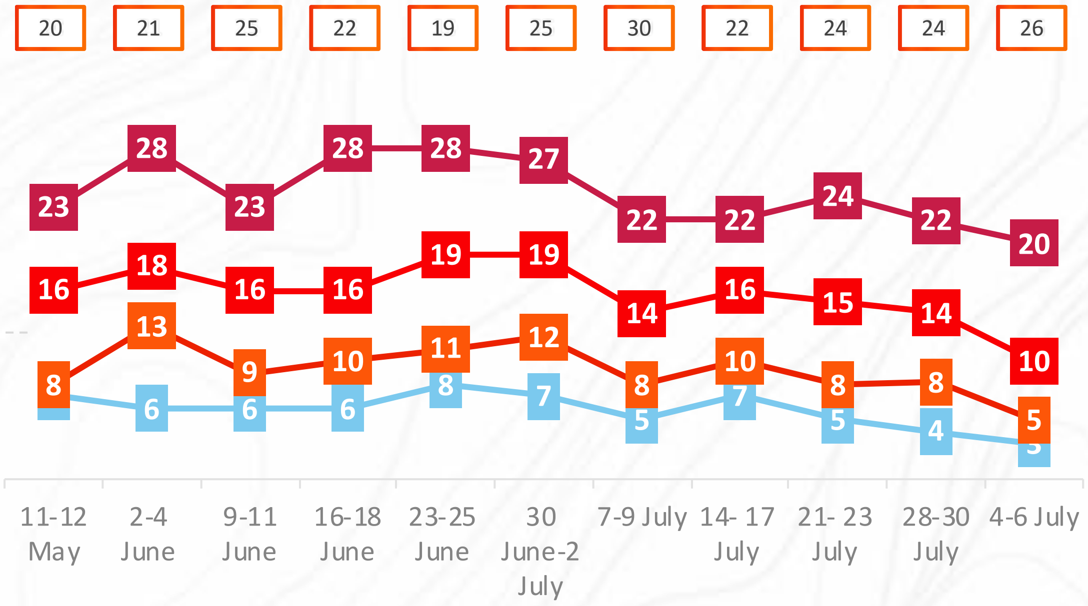
8.7

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

4.7

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

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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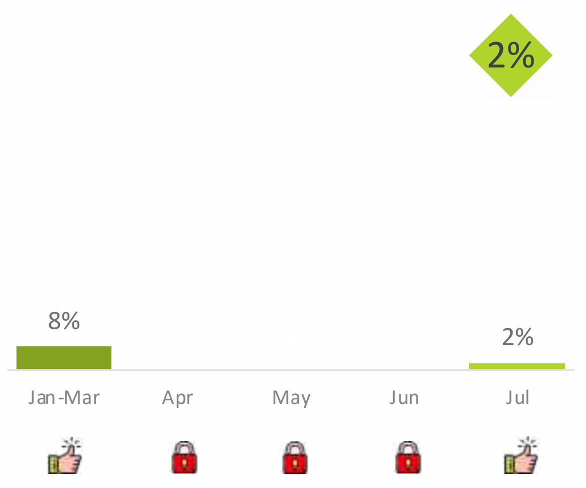
Market Recovery Tracking: Visit a theme park

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

The proportion who have visited a theme park since being able to do so remains fairly flat at 3%. The likelihood to visit a theme park by the end of the year dropped for the second consecutive week to 12% - the lowest level since research began.

Visited a theme park since permitted



This week

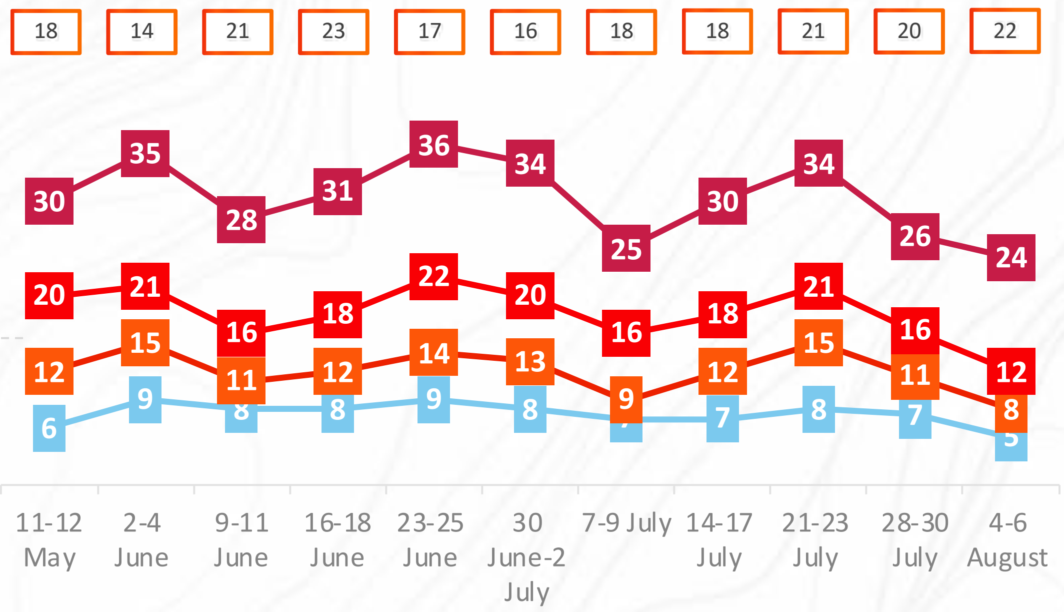
8.7

Average time **since** the activity last done

4.8

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

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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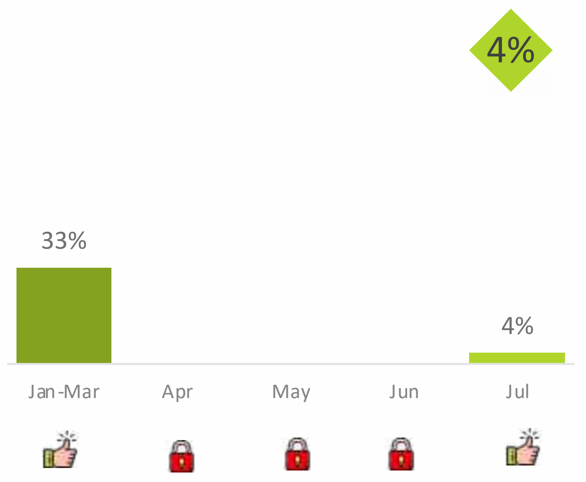
Market Recovery Tracking: Visit a museum/gallery

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

This week we see NET activity for visiting a museum or gallery remain flat at 4%, with intention to visit by the end of the year dropping to 23%. Through word of mouth from visitors who have visited the recently reopened major museums, such as the Natural History Museum and the V&A, others may soon be reassured of the safety measures put in place leading to an increase in intention – though fears of a second wave are particularly unhelpful to indoor attractions.

Visited a museum/gallery since permitted



This week

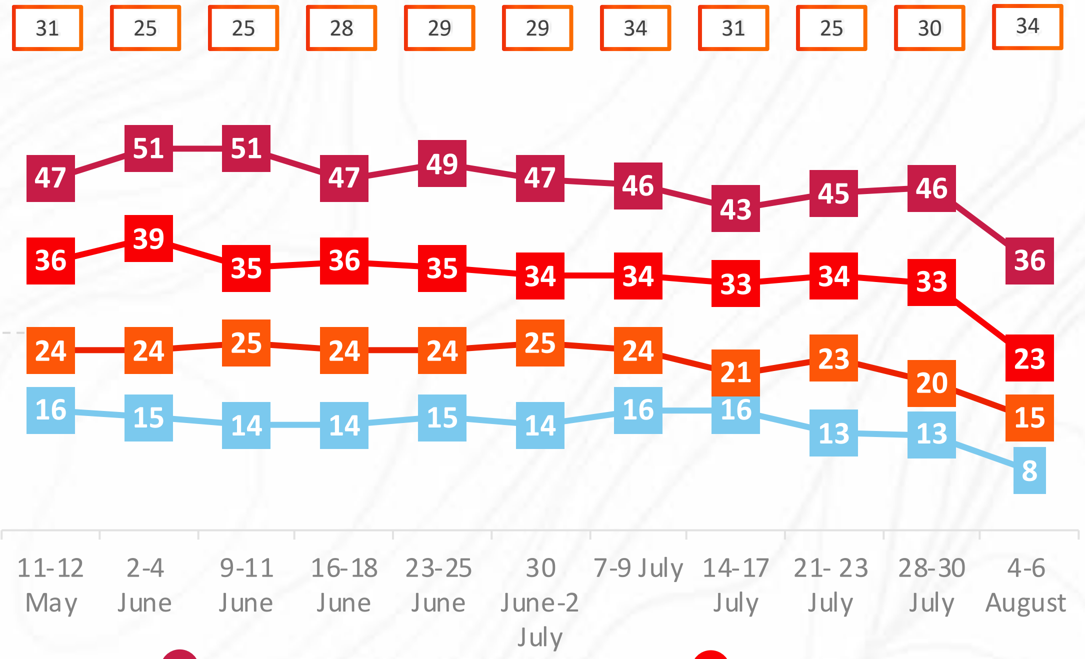
7.8

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

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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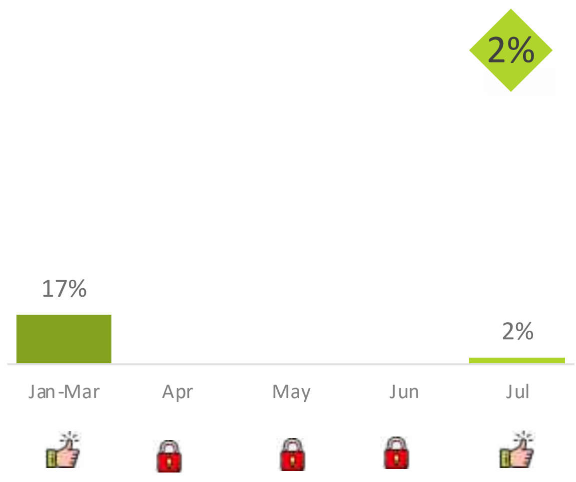
Market Recovery Tracking: Visit a small historic house

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

In line with other indoor sites, the proportion of people who intend to visit a small historic house by the end of 2020 drops for a second consecutive week, with the proportion planning to visit by the end of August falling from 9% to 6% - the lowest level recorded.

Visited a small historic house since permitted



This week

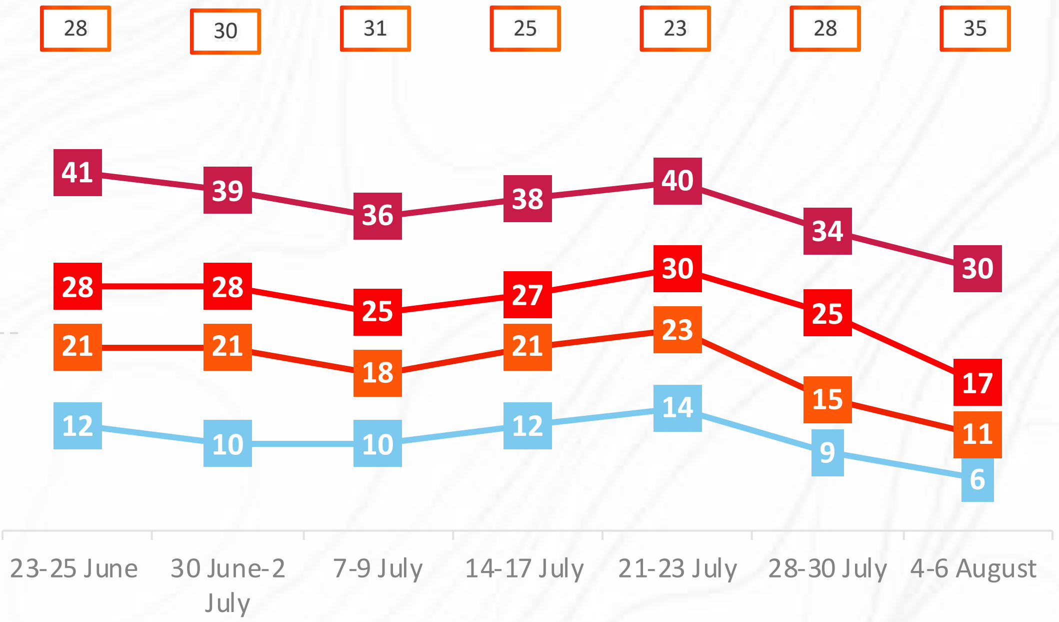
8.0

Average time **since** the activity last done

4.2

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

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

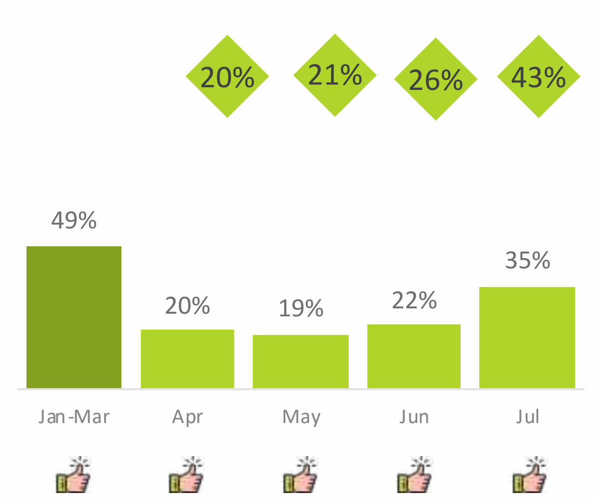
BVA BDRC

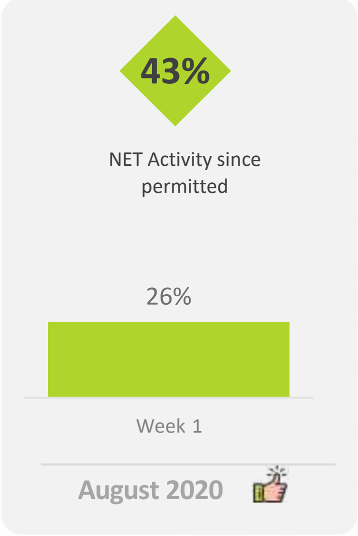
Market Recovery Tracking: Go to an outdoor park or scenic area

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

Use of outdoor parks and scenic areas remains buoyant. 35% of travel activists did so at some point in July, while 26% have already done so in the first week of August. That said, net participation levels does not rise any further. Looking ahead, intention to visit an outdoor park or scenic area by the end of August and September remains relatively steady also, with help from the warmer weather putting people in the mood to find a shady outdoor spot somewhere scenic.

Went to an outdoor park or scenic area since permitted





This week

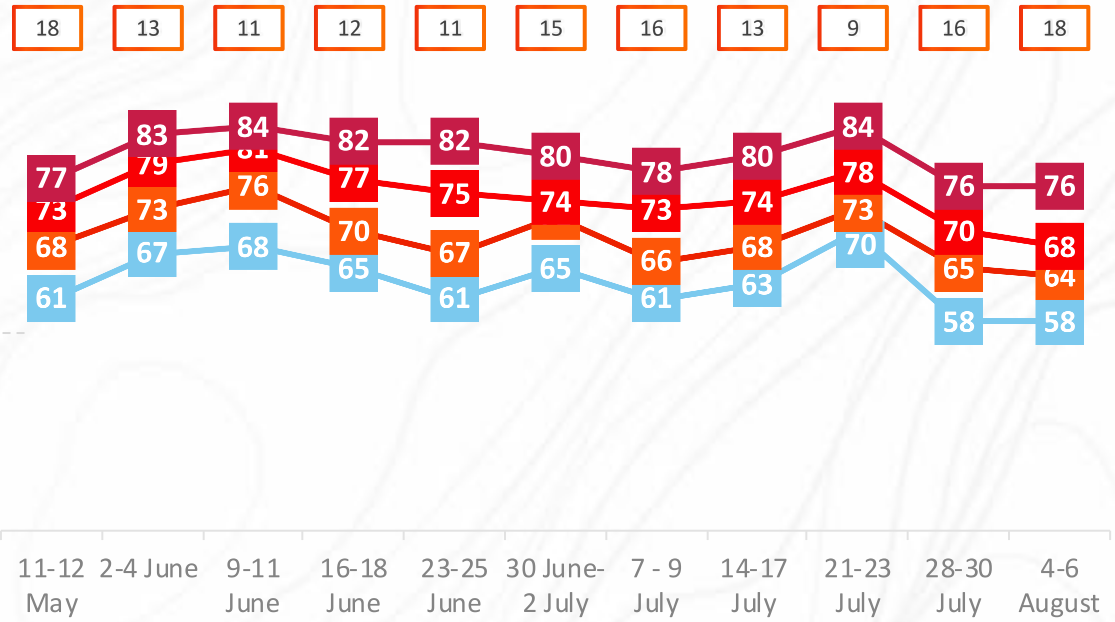
4.5

Average time **since** the activity last done

1.4

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

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?

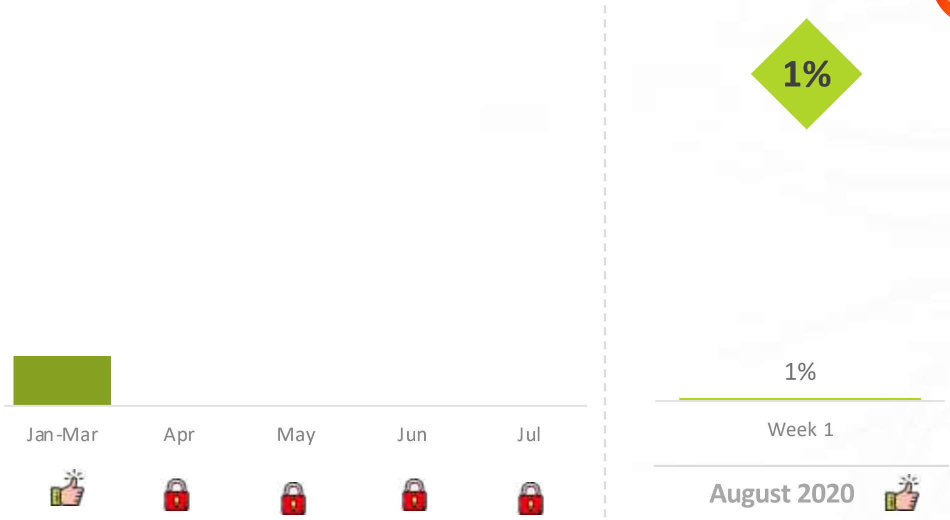
ALLIGATOR BVA BDRC

Market Recovery Tracking: Visit an indoor play centre

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

Despite indoor play centres in Wales reopening from the 10th of August, intention to visit such a venue by the end of the year has decreased, falling to 9% - in line with the trend observed for other indoor facilities. No doubt industry eyes will be focused on Welsh indoor play centres this week to see how they fare during their first week of re-opening. We imagine that reports of successful re-openings in Wales may just push up intention across the UK in the next few weeks.

Visit indoor play centre since permitted



7.9

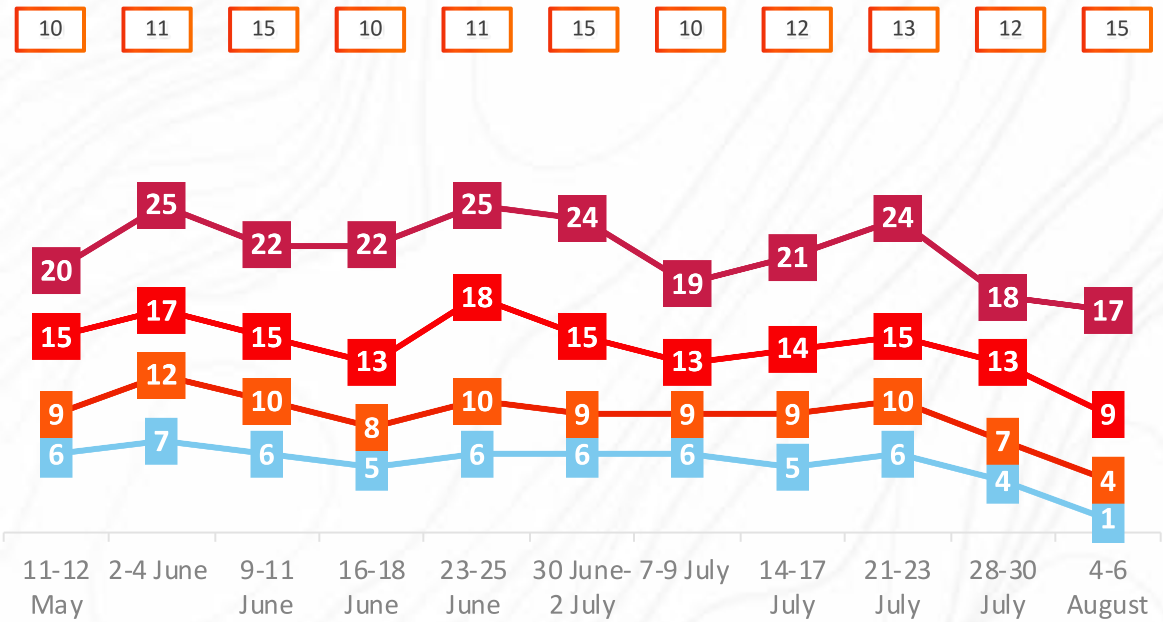
Average time **since** the activity last done

4.9

Average time **before** doing activity

When the activity will next be done

This week



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

NET participation since pandemic / activity permitted

Activity is not permitted

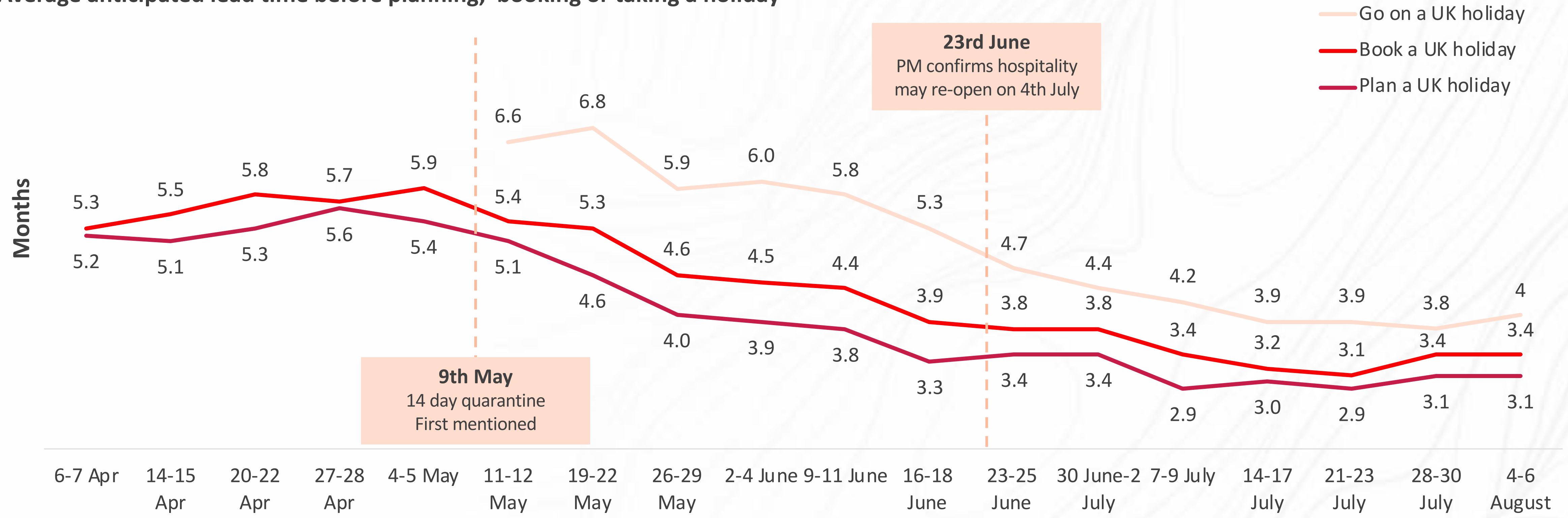
Activity is permitted

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

The lead time for going on a UK holiday continues to plateau this week, driven by some people having *already* taken their summer trip.

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



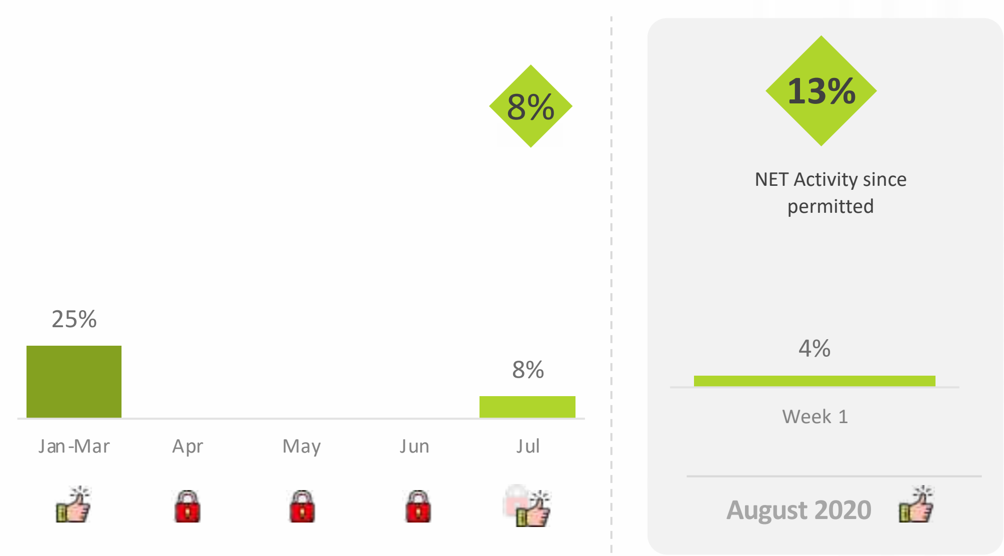
ALLIGATOR BVA BDRC

Market Recovery Tracking: Go on a UK holiday

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

It will be very interesting to see how the remaining weeks of the school holiday peak pan out. At the end of the first week of August, 13% had taken a UK holiday since permitted to do so, compared with 25% in Q1 of 2020. Intent on taking a holiday by the end of August, September and December all drop, but some of that may be driven by those who have done so already

Proportion been on a UK holiday this year



This week

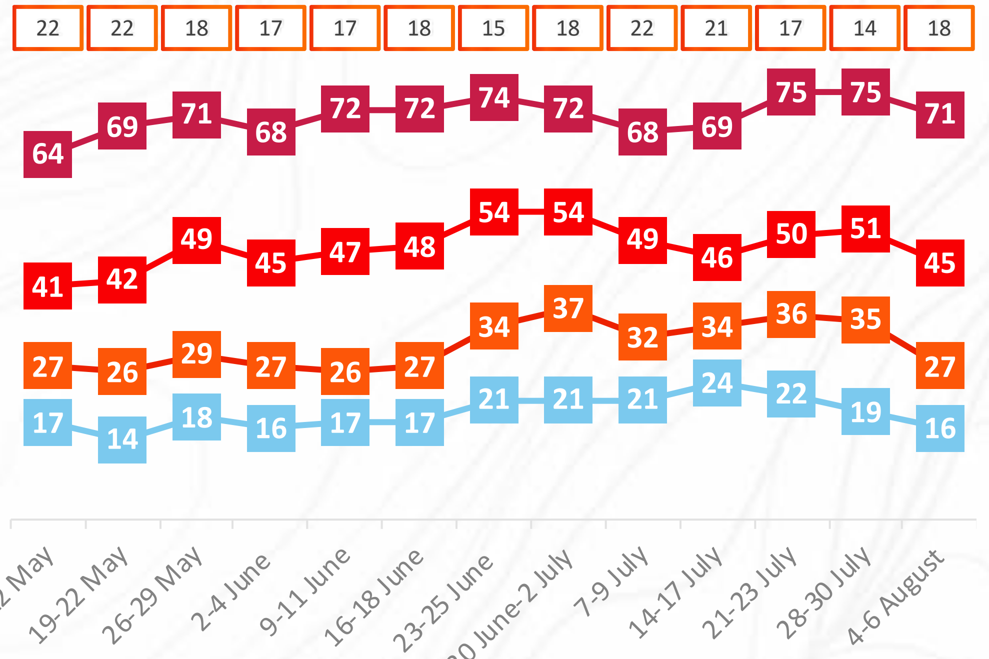
7.3

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

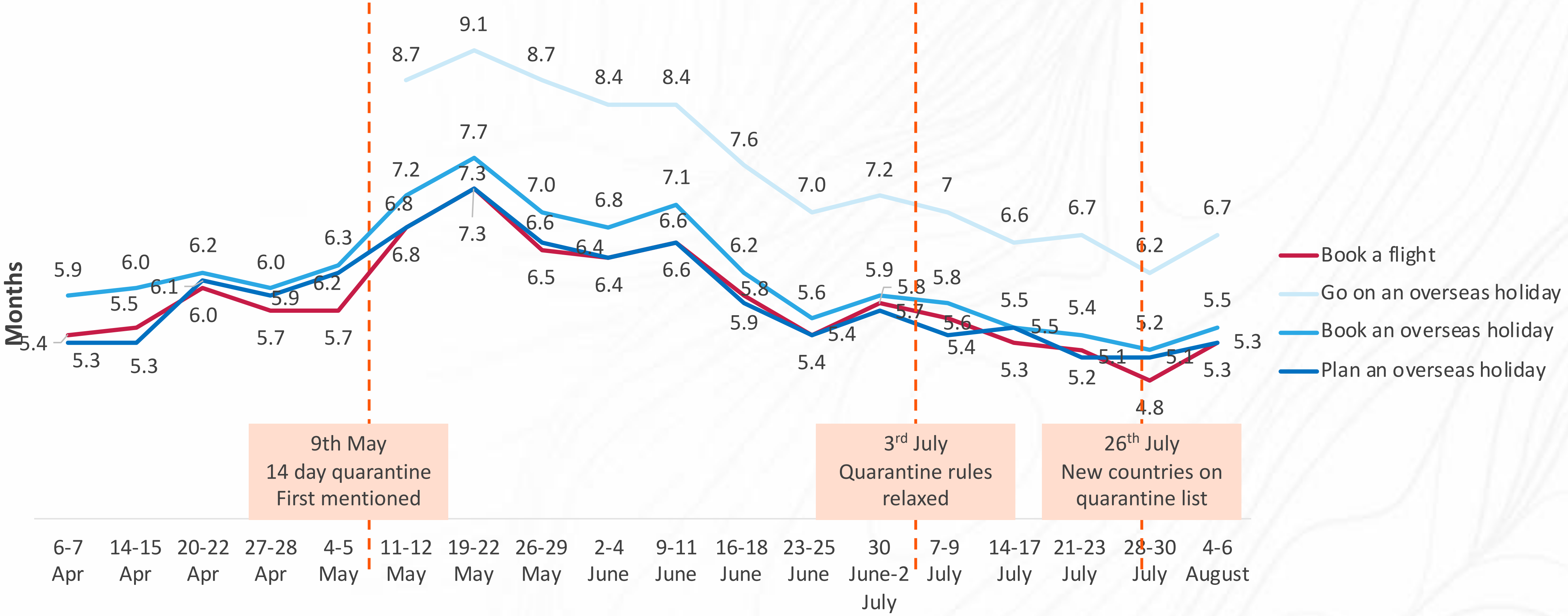
By end of September 2020

By end of August 2020

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?

Average lead times for going on an overseas holiday see a rise this week, possibly as a reaction to changes in quarantine rules upon returning from certain countries

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

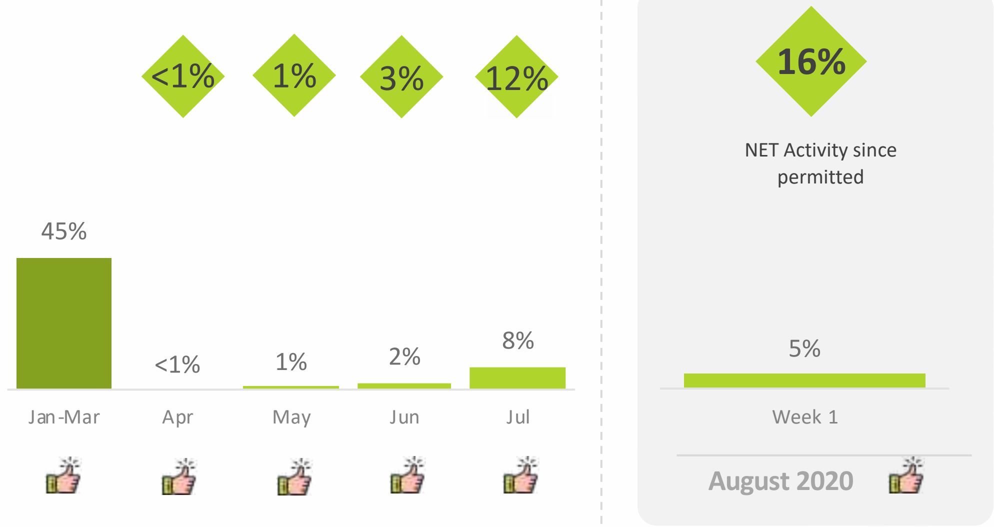


Market Recovery Tracking: Book hotel accommodation

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

Whilst intentions to book accommodation by the end of April 2021 or later remain flat at 60%, the proportion intending to book before the end of 2020 dropped, most notably amongst those looking to go before the end of September, which fell to its lowest levels yet of 16%. With news changing each day, people may be choosing to book spontaneous last-minute trips rather than risk advance booking for a trip they are uncertain will go ahead.

Book hotel accommodation since permitted



This week

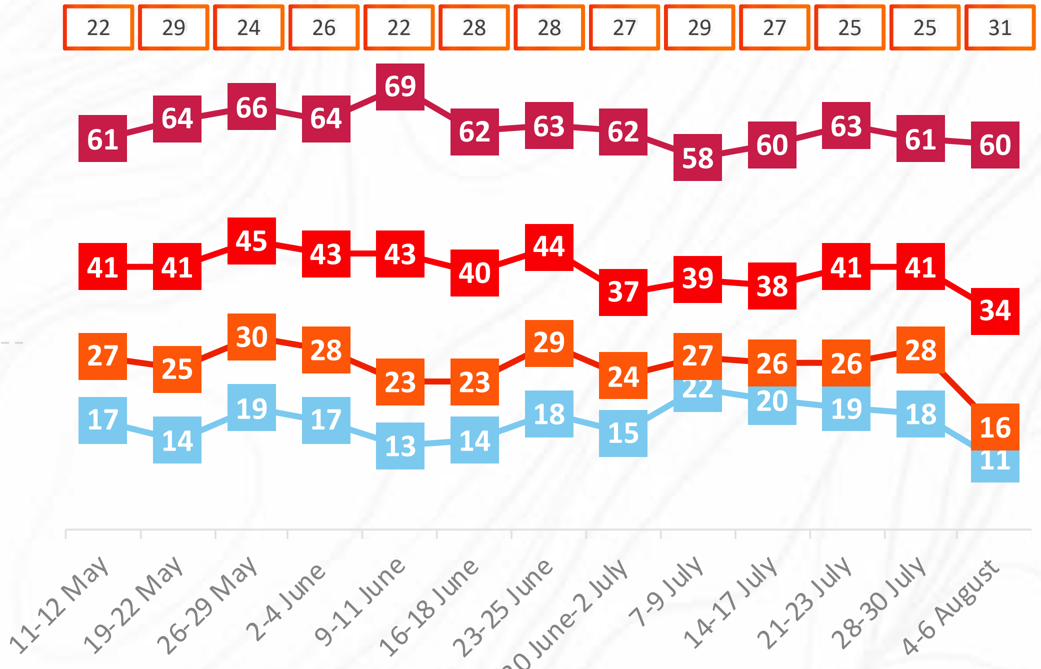
6.8

Average time **since** the activity last done

4.3

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

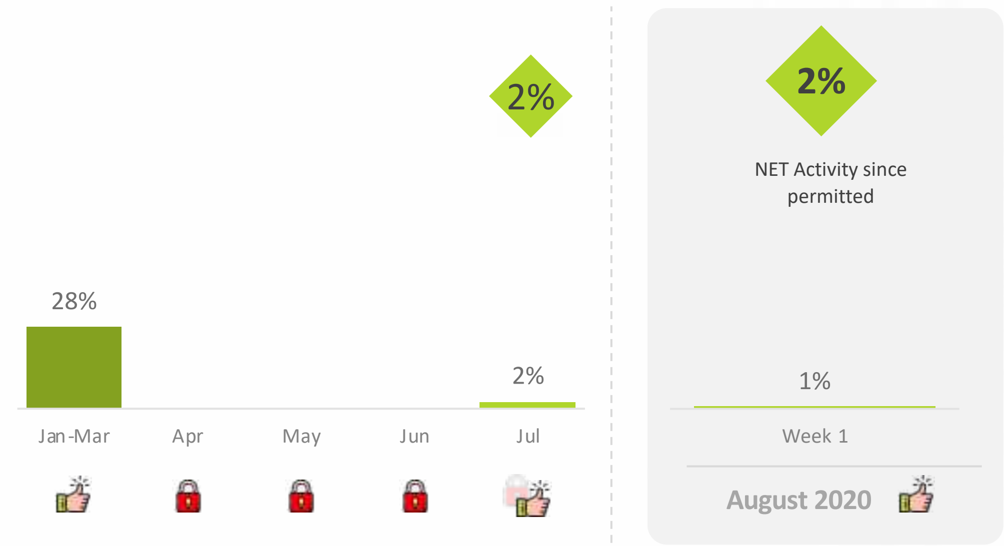
Q12. Given what you know today, when do you anticipate doing the following? Base all
Q1a. And when exactly was the last time you did the following activity/activities?

Market Recovery Tracking: Go on an overseas holiday

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

Following the week where the government imposed a last-minute quarantine for arrivals from Spain, confidence in overseas holidays has dropped, with those hoping to go by the end of September continuing to decline, falling to 4%. Fears of a second wave have also perhaps driven down intentions to go for some winter sun, with those expecting to go before end of December 2020 dropping to 12%- the lowest level seen yet.

Go on an overseas holiday since permitted



NET participation since pandemic / activity permitted

Activity is not permitted

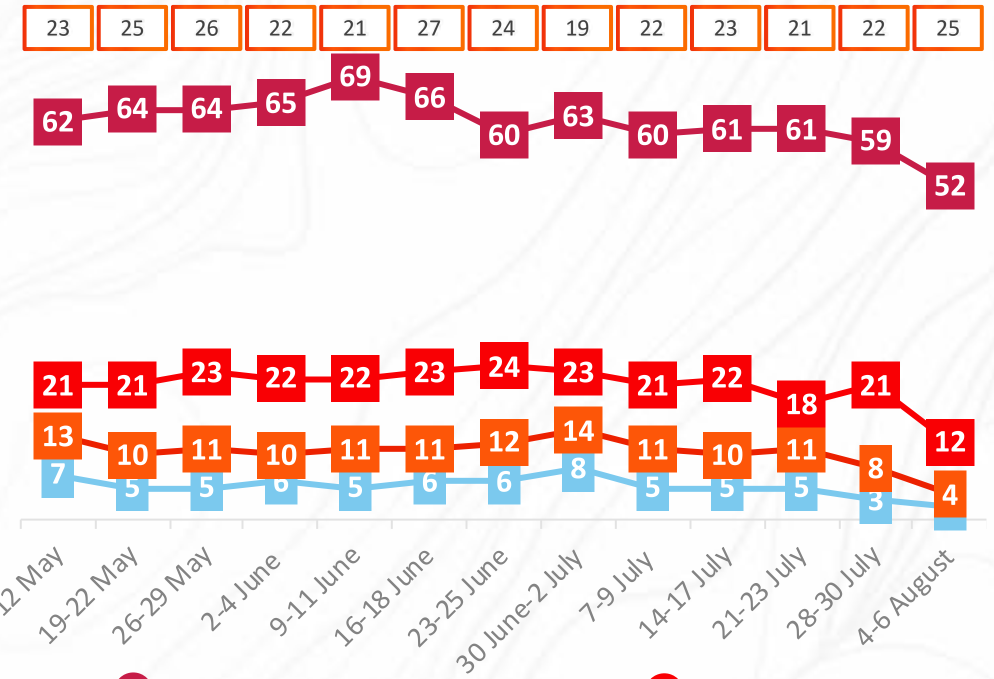
Activity is permitted

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



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

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 travellers are angered and confused by the swift decision made by the UK Government to introduce quarantine for Spain, with those in self-imposed isolation viewing the implementation of quarantine as poor

Confusion

"Why can't we do what Germany's done and only make people quarantine when they've been in areas with high rates of infection so places like the Canary islands & other places of mainland Spain where infection rates are low still get income? #CanaryIslands #spainQuarantine"

Poorly executed

"Coming back from Spain to Luton last Sunday, I had to search online for form. It said I would need to show it to officials. No. In Valencia I was greeted by nurses, temp checks, paper forms in spanish / english to hand to official and that is with no quarantine."

Inconsistent rules

"Returned from Spain to the UK, which means a self-imposed 2-week quarantine. But was never told I needed to fill out a form. (Had to find it myself.) Never greeted by border control. (Just breezed right thru e-Gates.) And was never asked to show said form. (Airport was empty.)"

Lost money

"Real Madrid are flying into Manchester next week to play ManCity in the second leg of the Champions League. Apparently with no quarantine! We had to cancel our holiday to Spain and lost money!!! @BorisJohnson what are you playing at?"

Confusion

"You go to Spain for a week.... are exposed to covid while you're there, get tested at the airport on your return...... you will likely test negative whether you have it or not! How does that help exactly? #COVID__19 #SpainQuarantine"

Confusion

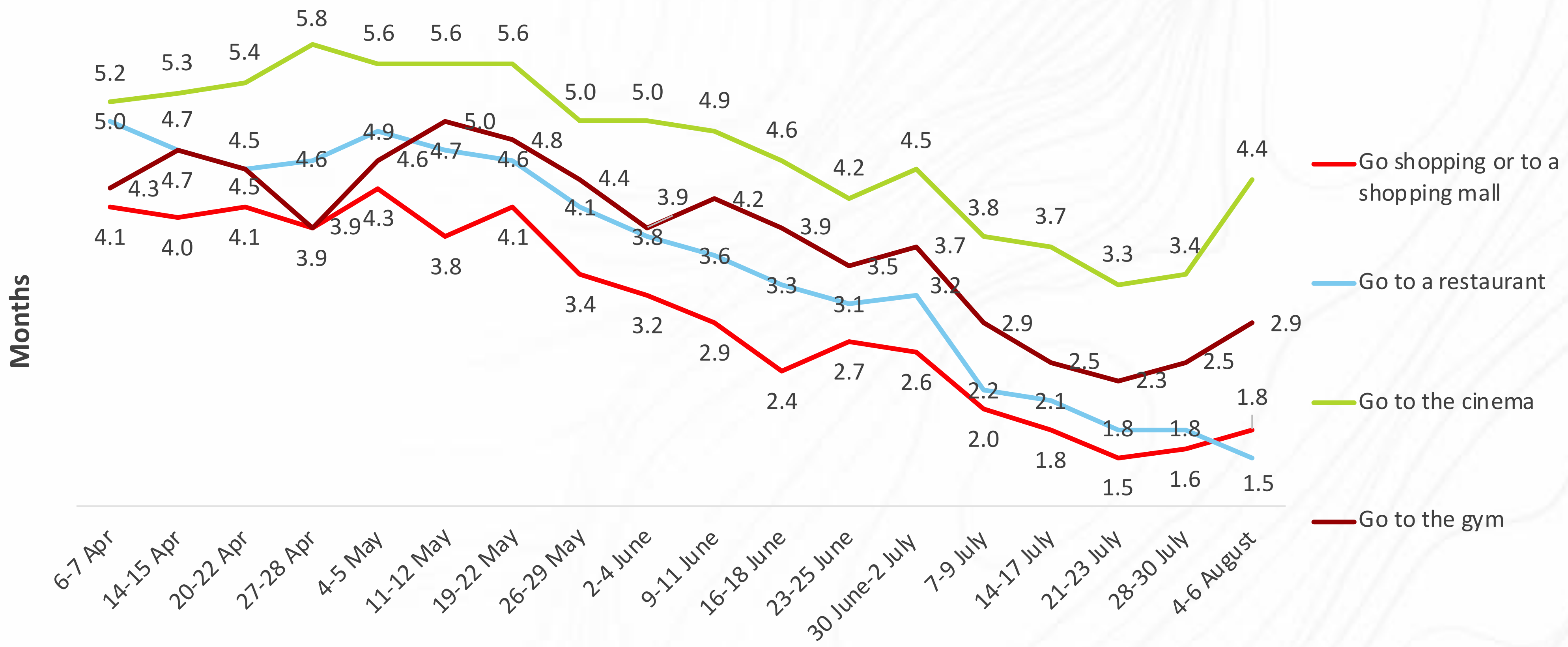
"So- you can travel in an out of the north of England, go to work, bars, shops, restaurants, HOLIDAY there but you can't go to areas of Portugal / Spain where rates are low. Shambles doesn't cover it"

Poorly executed

"with my trip to Bilbao in September rapidly going out the window, got to say it's plain weird that you can go to Gibraltar stand about 10 yards from **Spain** but not be subject to the return **quarantine**. Does the virus get halfway across the road and go "oop this will do me"?."

While average lead time before going shopping, to the cinema or gym increases, Rishi Sunak’s ‘Eat Out to Help Out’ scheme has driven up intention to go to restaurants, with lead times dropping as people look for a last minute bargain meal.

Average time before undertaking leisure activities



ALLIGATOR

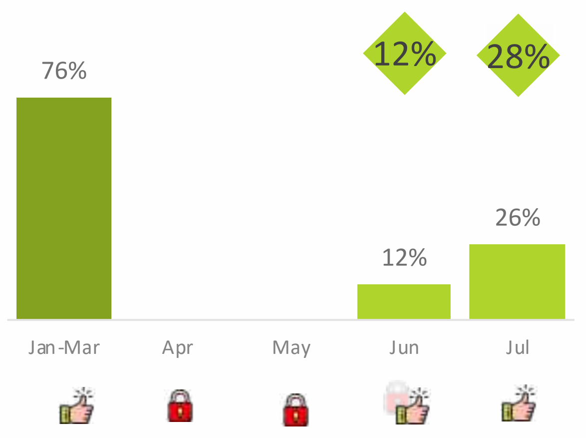
BVA BDRC

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?

As people get used to wearing masks in shops we see the decline in those intending to go shopping in August stabilising. Cumulatively, 30% have been on a shopping trip since permitted to do so, still less than half the proportion who did so in Q1

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



This week

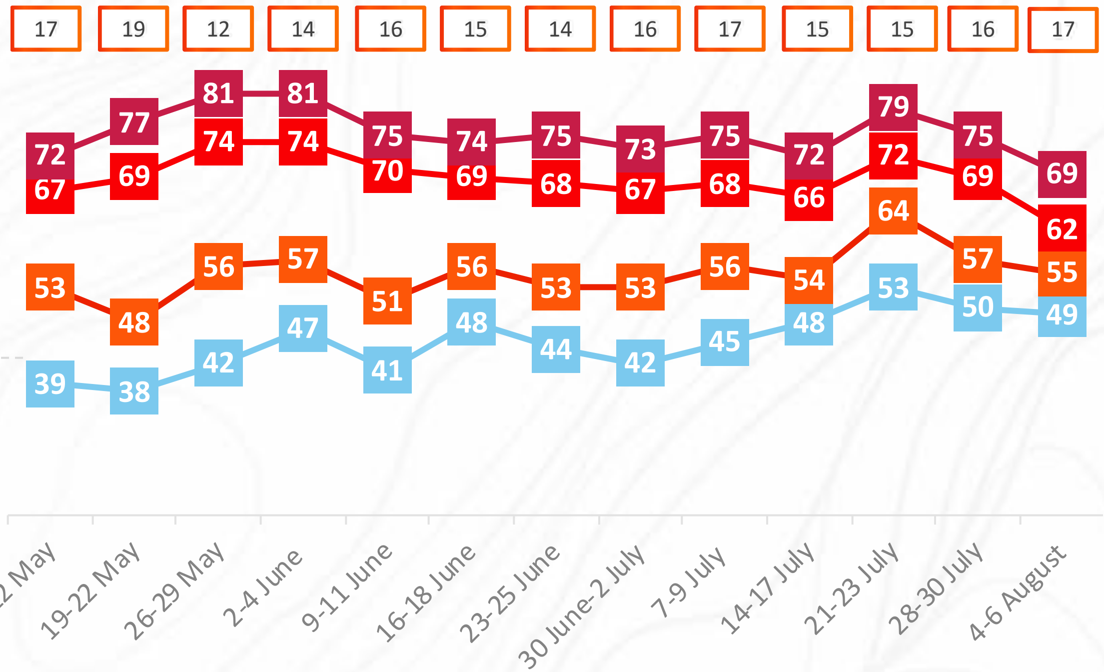
4.3

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

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?

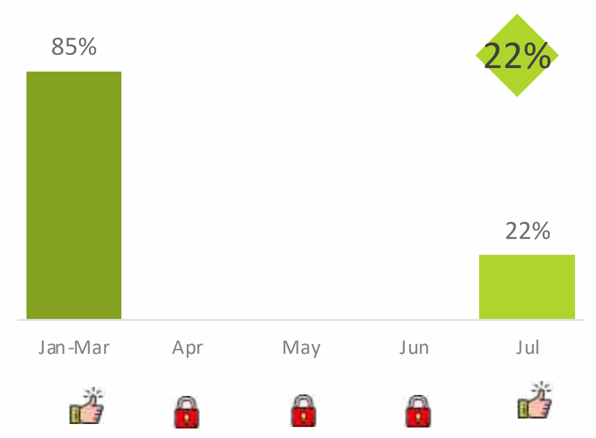
ALLIGATOR BVA BDRC

Market Recovery Tracking: Go to a restaurant

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

The 'Eat Out to Help Out' scheme is likely to be behind the continued week-on-week increases in intention to visit a restaurant in August, with almost two thirds intending to go to a restaurant before the end of August. Intentions to go to a restaurant after August climb at a slower pace.

Gone to a restaurant since permitted



This week

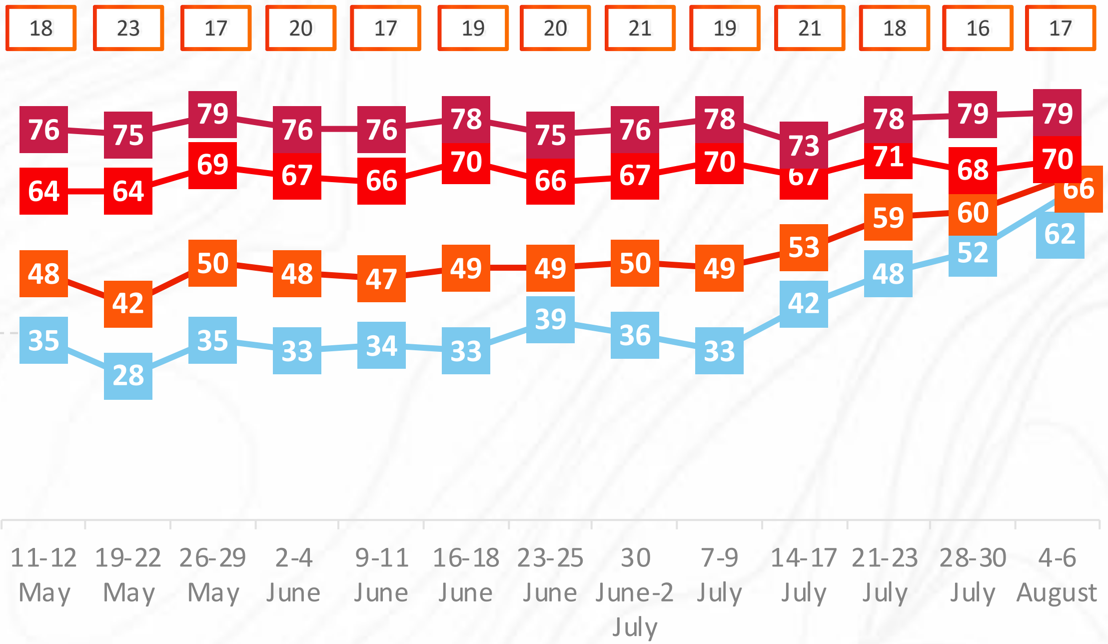
3.9

Average time **since** the activity last done

1.5

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

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?

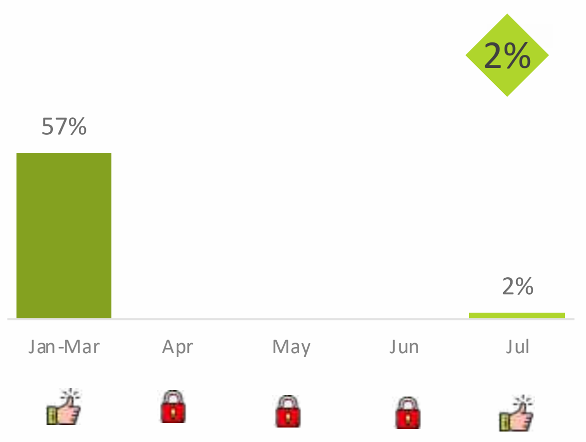
ALLIGATOR BVA BDRC

Market Recovery Tracking: Go to the cinema

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

The short-to-medium term future of the cinema continues to be uncertain, with release dates of blockbuster movies continuing to be pushed back. Although some outdoor and drive-in cinemas see demand grow in the UK, intentions to go to the cinema before the end of December nevertheless dropped from 37% to 23%.

Gone to the cinema since permitted



This week

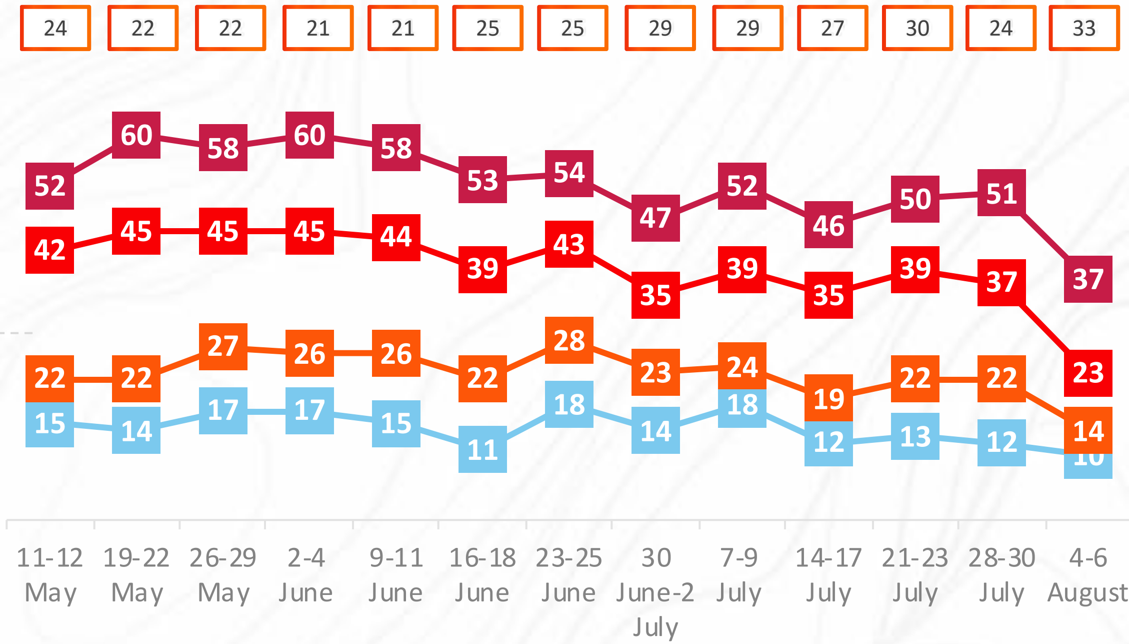
6.9

Average time **since** the activity last done

4.4

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

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?

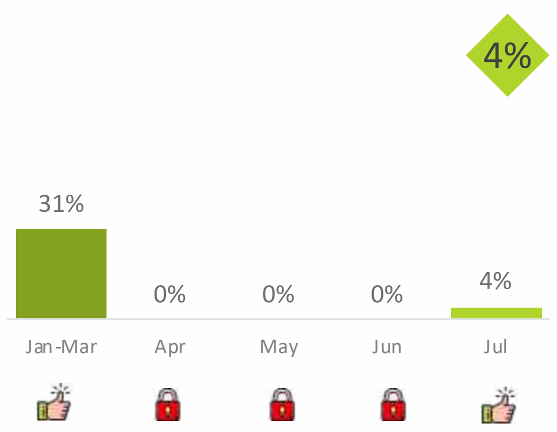
ALLIGATOR BVA BDRC

Market Recovery Tracking: Go to the gym

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

Since gyms have been able to reopen, the number of people who have made use of a gym facility has remained fairly stable at around 3%. Looking ahead, intention to visit a gym by the end of the year dropped for the second consecutive week, from 26% to 19%.

Gone to the gym since permitted



This week

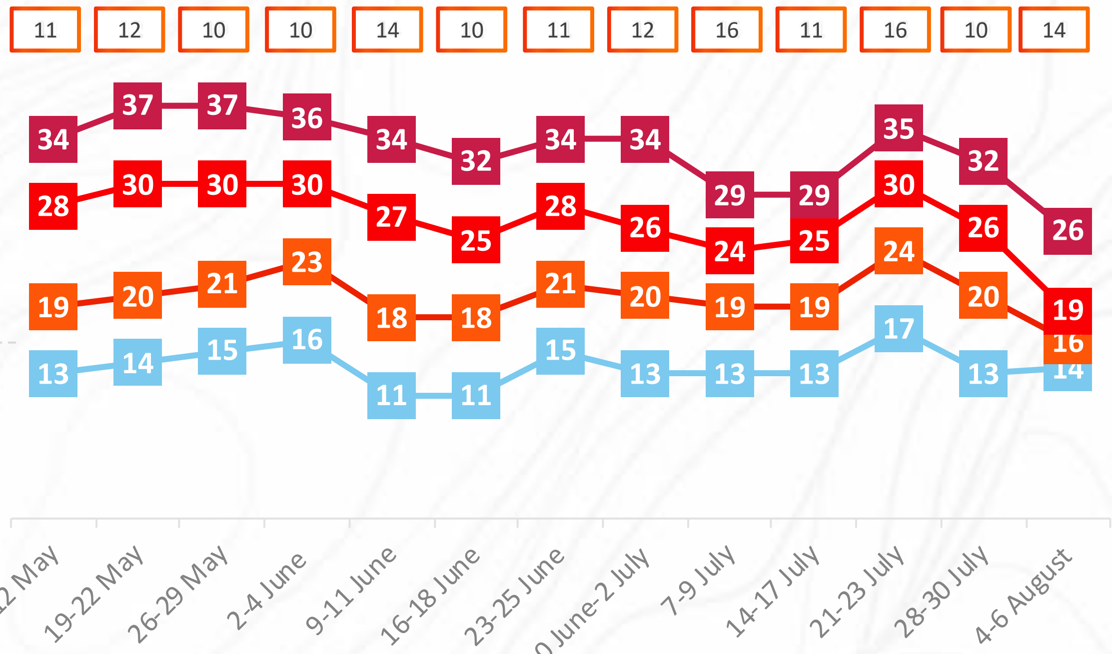
5.8

Average time **since** the activity last done

2.9

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

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?

On social media: gyms and leisure centres re-opening received a mixed response, with some excited to get back whist others feared it was still too soon

"Can't wait to go back to the gym Monday! Perks of living in England."

"For the first time I'm a little sad to no longer live in England. Hope everyone enjoys getting back to the gym! And that Scotland follows soon!"

"We now proudly have 228 gyms open across Northern Ireland and England. Our Welsh gyms are opening on he 10th August, we're still waiting for a confirmed opening date in Scotland, but it is looking like September #PureHelp"

"But Gyms are one of the highest risk areas. All that harsh exhaling and rapid inhaling. Sweat transfer etc. Should be weeks away before you'd think it safe to reopen- consistently low transmission rates needed for a start."

"People may be worried about using public transport. They may think it will take me exponentially longer because there's less space and less people allowed on public transport as well as simply worried about the potential contamination. But even for Uber, who will necessarily trust that the Uber driver will clean the car every time after a previous passenger has been?"

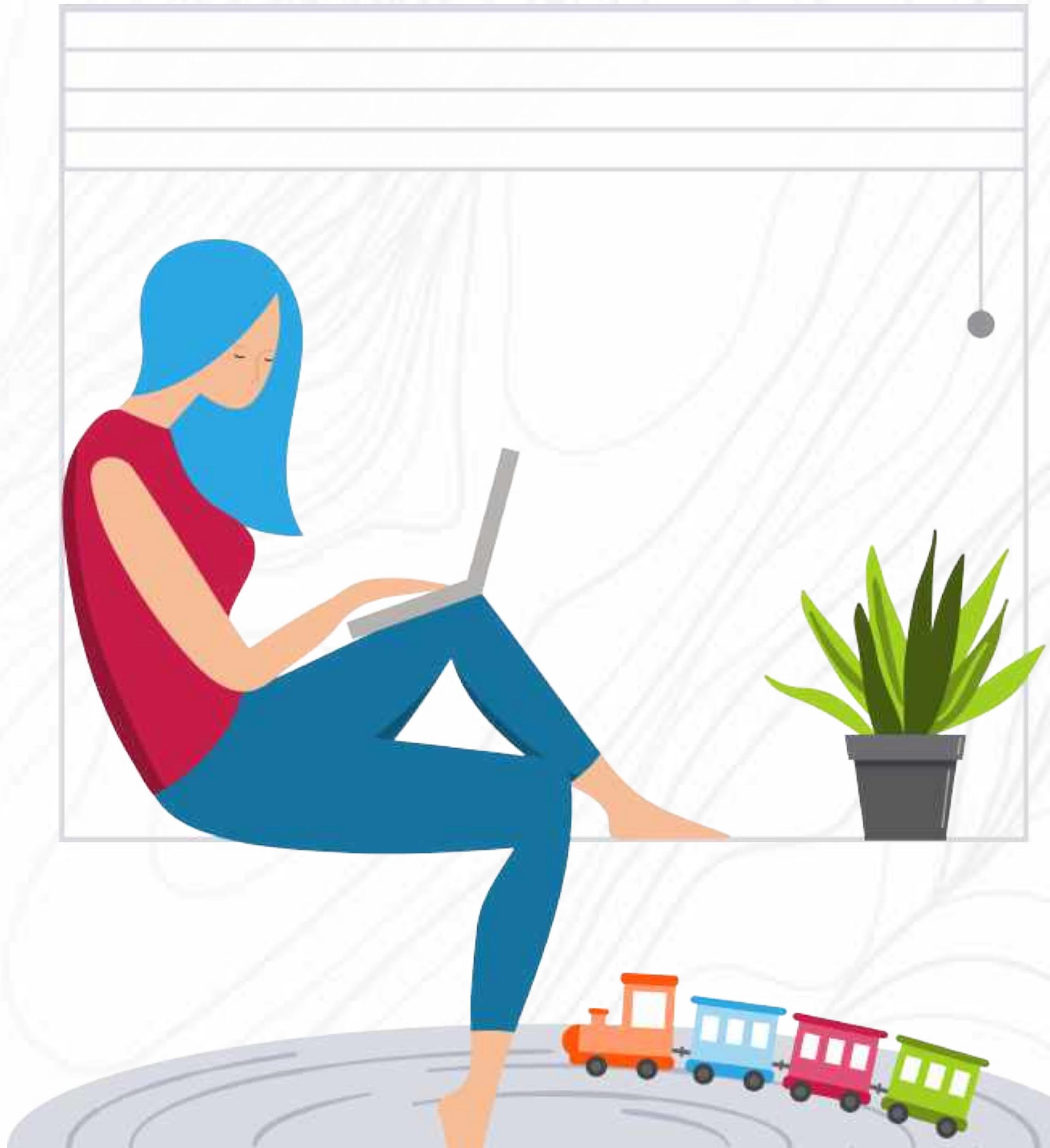
"Having been back to the gym here in England, I've seen the measures put in place and feel completely safe. Of course, nothing in life is without risk. It's possible to get hit by a car whilst out walking or running."

"My local pool (in England) isn't scheduled to reopen until 15th Aug (although this isn't set in stone) for lane swimming only, no lessons or clubs yet. Not all pools, pubs & gyms are open or opening its frustrating for sure."

"Not all centres will reopen today - not financially viable yet for some. And there are warnings many public leisure centres & swimming pools will need more ££ help to survive."

"Will be heading back to the gym as soon as I feel it's safe to do so. With England still seeing 100 deaths a day though, now is not that time."

Transport

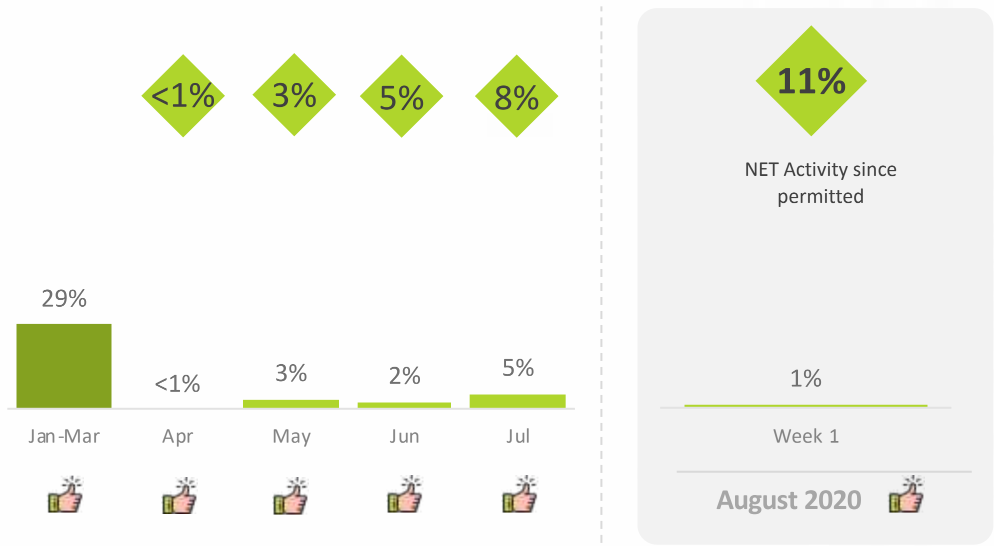


Market Recovery Tracking: Book a flight

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

Just over 1 in 10 Travel Activists have now booked a flight since the onset of the pandemic – a rate of recovery which falls into the 'steady rather than spectacular' category. For context, nearly 3 in 10 booked a flight in Q1 2020 in the (largely) pre-COVID period. Looking ahead, short term booking intentions decline this week. This may be partly due to the fears of a second wave, as well the fact that for a small proportion, their international summer holiday is now behind them.

Have done the activity since permitted



NET participation since pandemic / activity permitted

Activity is not permitted

Activity is permitted

This week

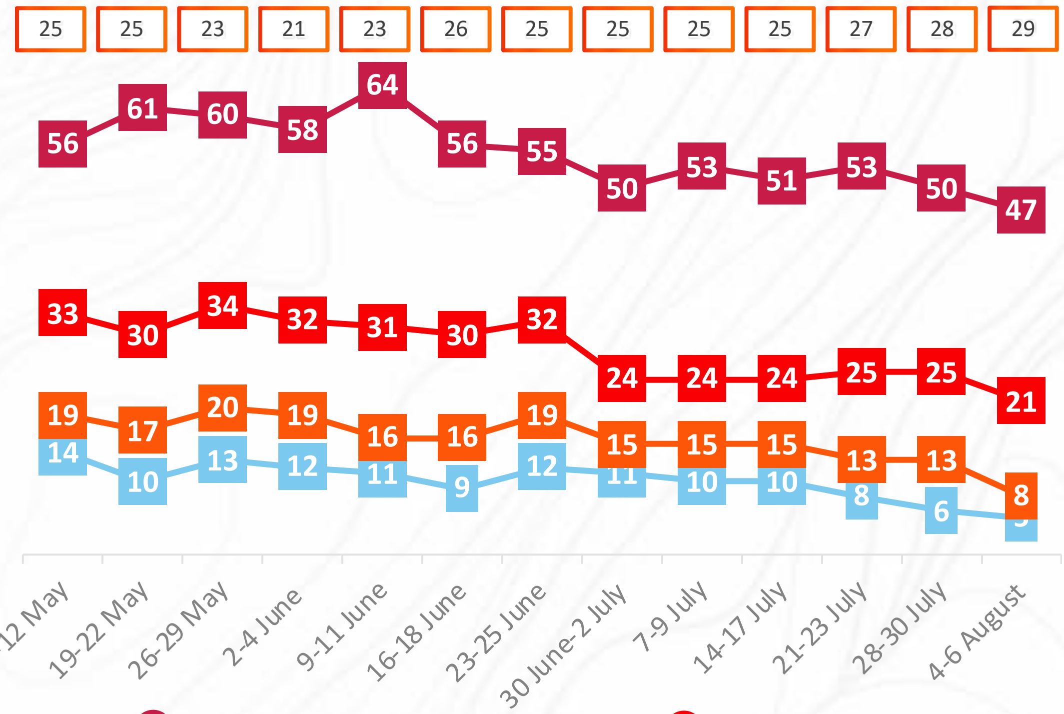
6.8

Average time **since** the activity last done

5.3

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

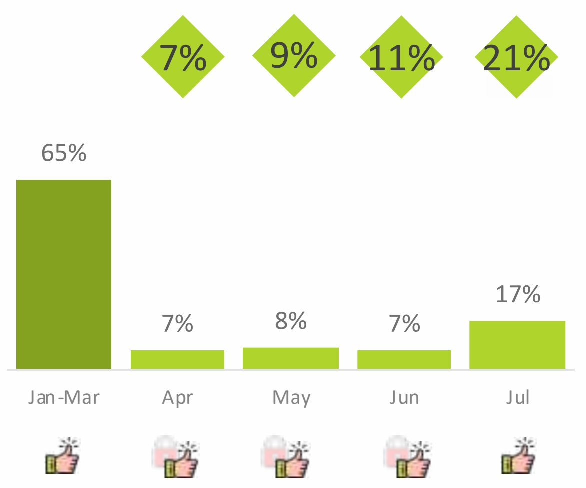
Q12. Given what you know today, when do you anticipate doing the following? Base all
Q1a. And when exactly was the last time you did the following activity/activities?

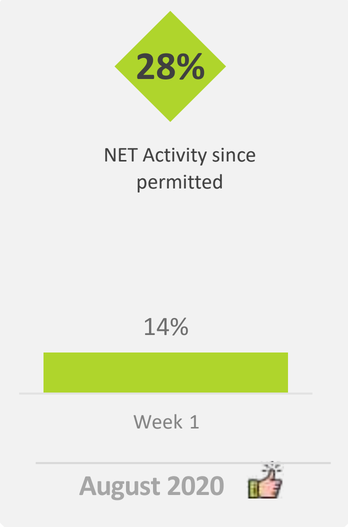
Market Recovery Tracking: Take the bus

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

Taking the bus continues its encouraging recovery pattern with average lead time to next anticipated journey declining once more. It is again the pragmatic policy supporters that make a major contribution to this development but this week also sees other segments increase their bus usage. The exception being the COVID cautious.

Have done the activity since permitted



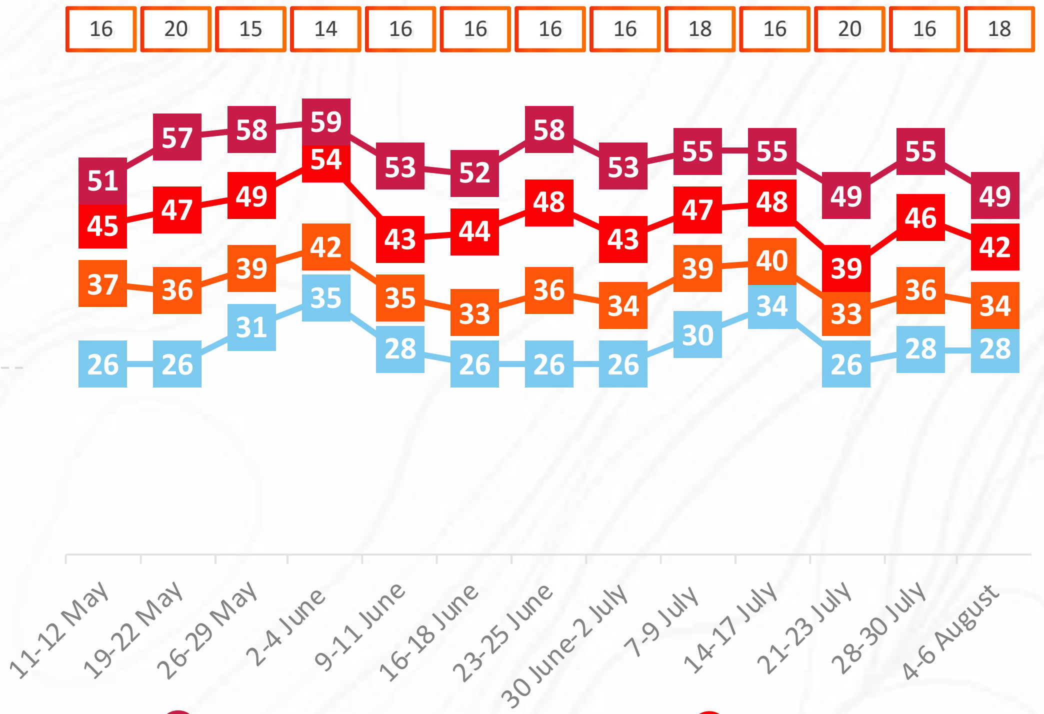


This week

3.4
Average time **since** the activity last done

2.0
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

% 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?

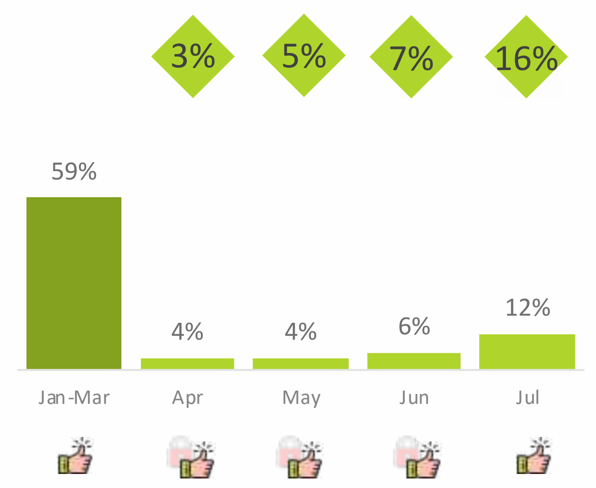
ALLIGATOR
BVA BDRC

Market Recovery Tracking: Take the train

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

The recovery of the rail sector remains slower than other transport modes. While 6% used the train in the last week, the overall incidence of rail travellers is unchanged from last week with future plans also less positive.

Have done the activity since permitted



This week

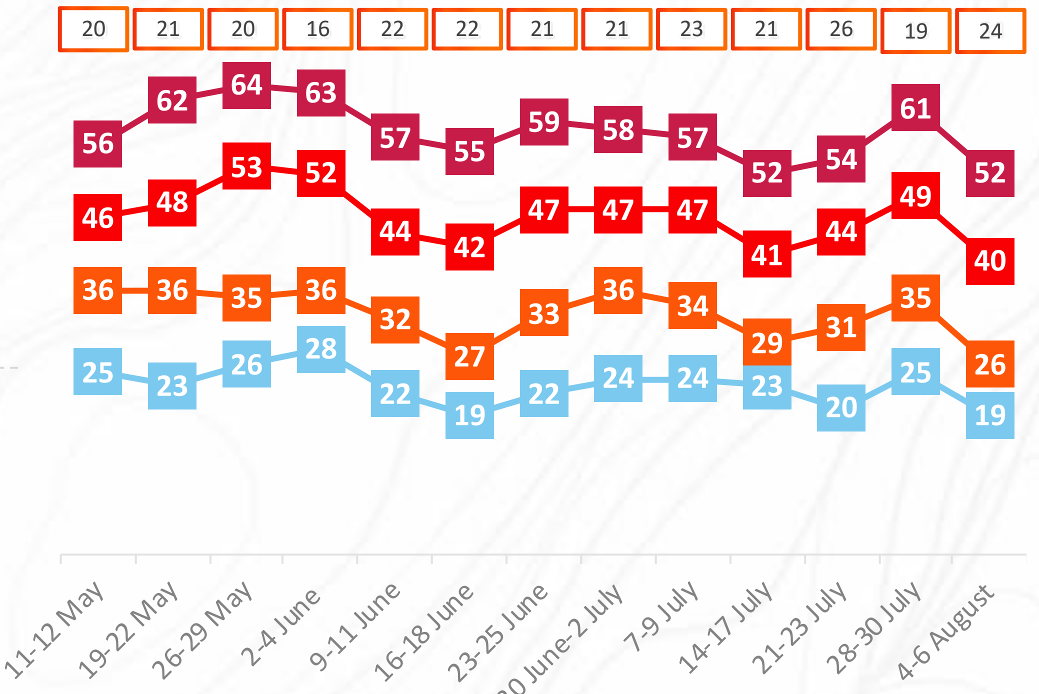
5.3

Average time **since** the activity last done

2.8

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

% NET participation since pandemic / activity permitted

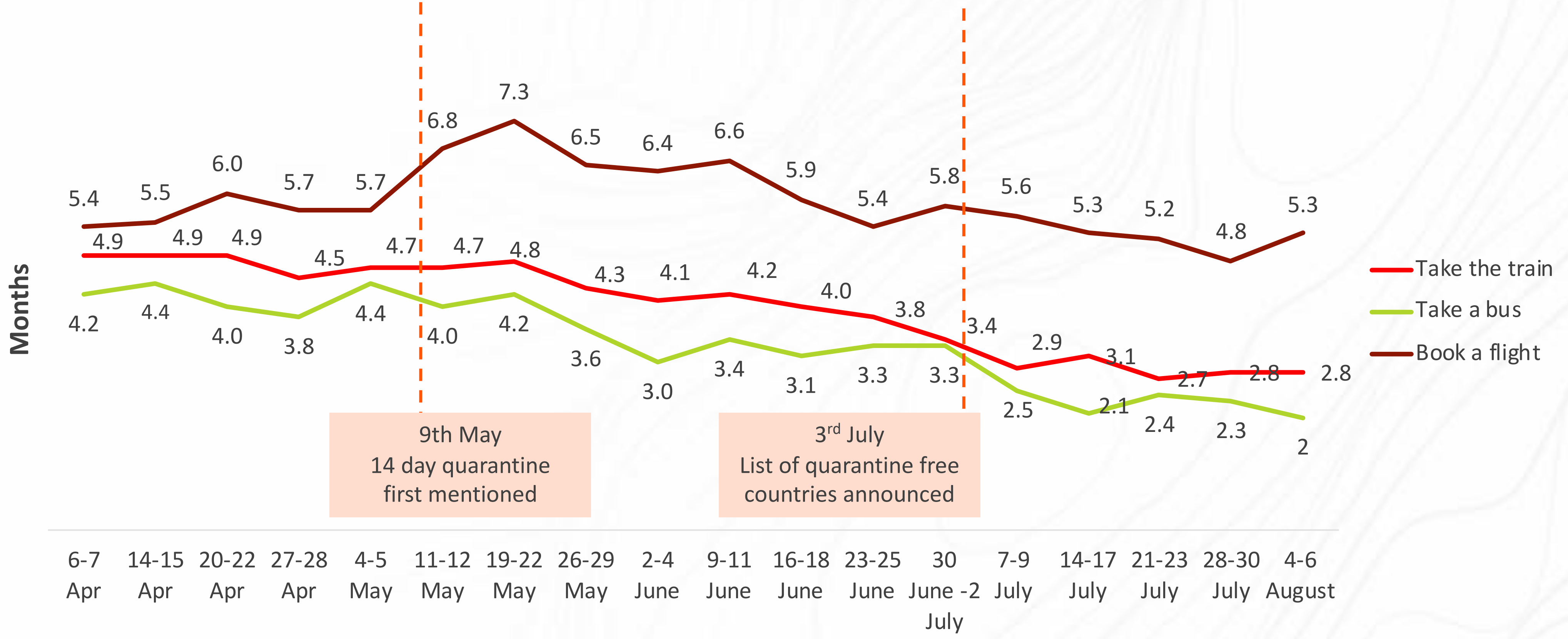
Activity is not permitted

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?

The average lead time to next bus journey reaches a new low which is encouraging news for the sector. For air travel, lead times lengthen after 4 consecutive weeks of shortening.

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



On social media: there has been a positive reaction to the concept of a flexible season ticket for those working in the office on a part-time basis

"I'd suggest underlying cause is not fear of virus. SO many people have found it transformative for mental health not to wake up stressed at 06:00 each morning, leaping on an app to check train chaos. And the huge financial savings. transport needs to catch up and respond."

"Capacity for ALL travellers, just in case they all chose to work on Mondays. Furthermore inflexible season tickets, as it states, are putting people off using the train. If we make attractive **flexible season tickets**, it will increase demand, requiring further trains."

"Hopefully when COVID19 situation has been stabilized. The train companies will bring **flexible season tickets**."

"If we are to go back to work and be more **flexible** with time in the office, work 3 days in the office and two from home, we need the rail companies to get on board and create a pay as you go **flexible** monthly and annual season ticket."

"Train companies have always failed at **flexible travel**. After coronavirus, it could be the only thing to save them."

"@EastMidRailway As more of us are working more days from home, will you consider offering more **flexible season tickets**? Maybe one that allows travel 3 days a week?"

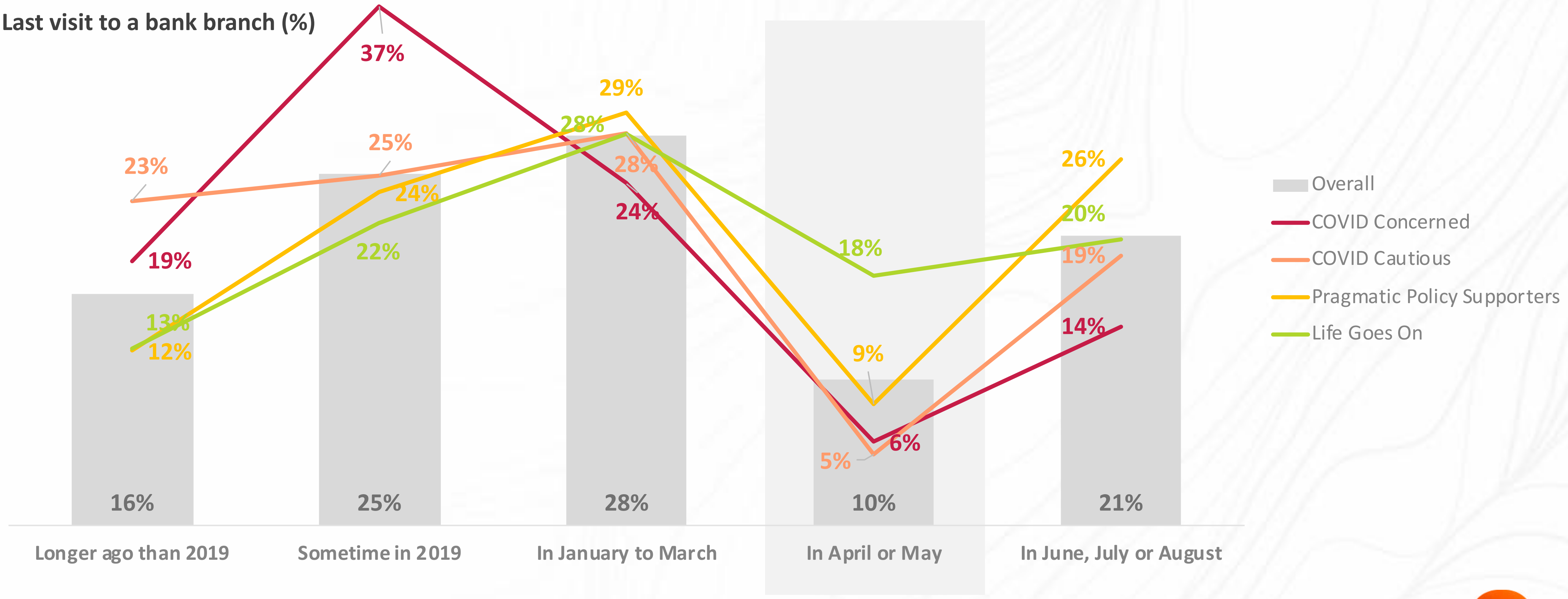
"High pricing is the issue. many will now WFH almost full time as companies are rethinking office space. If I had a choice to go into the office 2 days a week, I would. But you can't get a **flexible season ticket** so wouldn't be cost effective to travel."

Personal finances

As Brits increasingly embrace leisure activities and holidays, day-to-day experiences such as visiting bank branches are also returning

A fifth of consumers have visited a bank branch since restrictions were eased, with Pragmatic Policy Supporters making most use of the channel. While all segments heeded industry advice and lockdown rules to an extent, true to form, our Life Goes On segment are most likely to report branch usage in April or May.

Last visit to a bank branch (%)



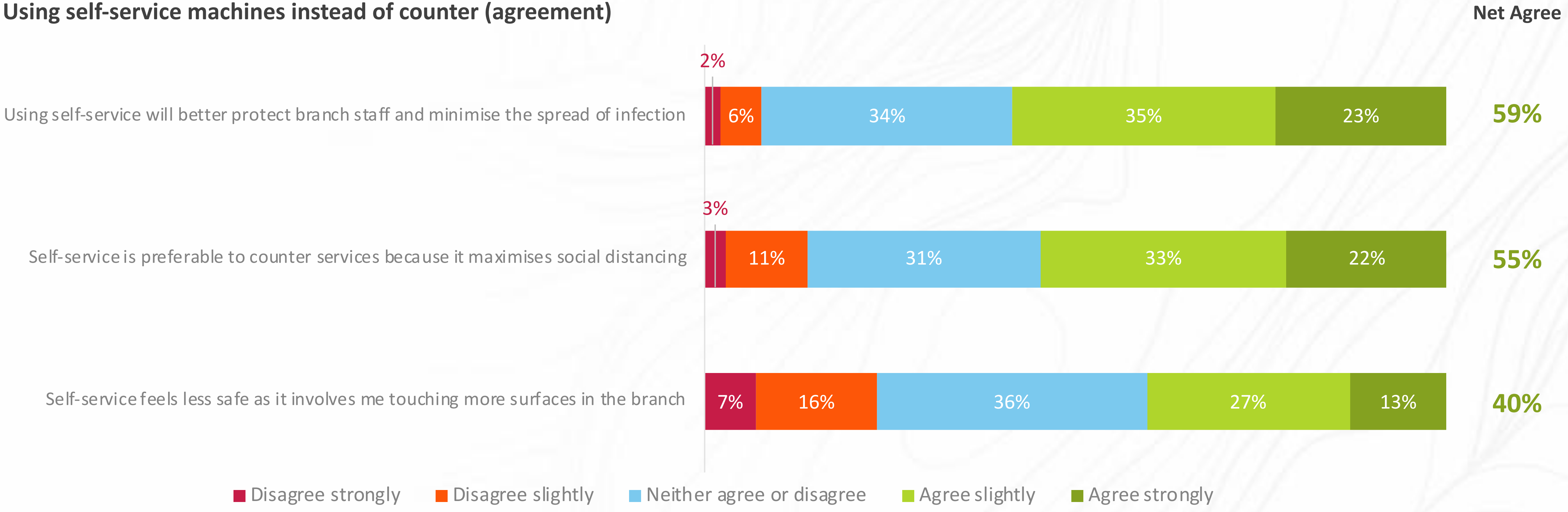
Q82: When was the last time you visited a bank branch?
Overall n=500, COVID Concerned n=63, COVID Cautious n=155, Pragmatic policy supporters n=101, Life goes on n=181

ALLIGATOR BVA BDRC

Views about the role or potential benefits of self-service during the pandemic are somewhat mixed

Reflecting the fact that we are still adjusting to life in the shadow of COVID-19, and have a lot to learn about the virus, most generally agree or are yet to form a view on whether self-service terminals with touch screens will help to reduce the spread of infection and maximise physical distancing. This is likely to be linked to corresponding doubts about whether these benefits may be offset by the need to touch more surfaces and any consequential hygiene implications.

Using self-service machines instead of counter (agreement)



If you needed to visit a bank branch tomorrow for a banking transaction that could be done using a self service machine or using a counter. In light of Covid-19, to what extent do you agree or disagree with each of these statements ?
Overall n=500

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Perceptions self-service go hand-in-hand with our COVID segments

The most frequent / recent users of bank branches, the Life Goes On segment, are also the least convinced of the potential for self-service to protect branch staff and maximise distancing efforts. While these views don't automatically translate into propensity to use the counter over-self service (or vice versa), it may nonetheless indicate a need for additional measures in branch to support continued migration towards self-service – particularly for those banks where it is a central aspect of channel strategy.





Using self service machines instead of counter (agreement)	Overall	COVID Concerned	COVID Cautious	Pragmatic Policy Supporters	Life Goes On
Using self-service will better protect branch staff and minimise the spread of infection	59%	65%	**68%**	58%	**48%**
Self-service is preferable to counter services because it maximises social distancing	55%	**69%**	58%	59%	**44%**
Self-service feels less safe as it involves me touching more surfaces in the branch	40%	44%	38%	42%	40%

If you needed to visit a bank branch tomorrow for a banking transaction that could be done using a self service machine or using a counter. In light of Covid-19, to what extent do you agree or disagree with each of these statements ?
Overall n=500, COVID Concerned n=63, COVID Cautious n=155, Pragmatic policy supporters n=101, Life goes on n=181

On social media: comments reveal a need for clearer hygiene measures and additional steps / comms to ensure a comfortable experience for all, particularly where vulnerable customers are unable to avoid the branch

 # Lack of hygiene in branch

"@HSBC_UK had to use an unsanitised internal phone in a branch today to call @firstdirect bank to arrange cash withdrawal-outdated system to start I had passport ID & bank card- but phone had no sanitiser or wipes nearby & it's used up against the face. Not #covidsafe"

 # Confusion over previous no mask rules

"Wearing a mask in the bank is bonkers. You couldn't make it up."

 # Making masks work for those in need of branches

"@Barclays one hour wait in Blackpool branch with mask on waiting for autism assessment and have to wait with mask on before I can be seen."

 # Preference of banking at home

"@NatWest_Help Hiya, due to Coronavirus, can you tell me if I can arrange a large CHAPS payment over the phone with yourselves? I'd really rather avoid going into branch if at all possible"

 # Preference of banking at home

"It gave me no choice but I have to go to the branch even though I shouldn't, as my partner is shielding. It's astonishing in this current situation Nationwide still making this essential service super difficult to do. + the customer service team doesn't have consistent info"

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…

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

WHERE (Who to TARGET, How to ACCESS them)

HOW (How to ATTRACT them, How to RETAIN them, How to MAXIMISE SPEND)

Methodology

Survey of Consumers

Nationally representative online survey, conducted weekly. This week we surveyed 1,755 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:

- 16,493 posts for the transport sector
- 13,862 posts from the leisure sector
- 9550 posts from the hospitality sector
- 17,685 posts from the financial sector

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