Tracking Consumer Sentiment on the Impact of COVID-19

Travel & Mobility, Leisure & Hospitality, Personal Finances

Weekly Update – 21st August 2020

BVA BDRC · ALLIGATOR

Introduction

As with every other major crisis, when the historians come to write about the COVID-19 period, some public figures will be deemed to have had ‘a good war’ (with medals to show for it), while others may have irreparably tarnished reputations and be cast into the wilderness.

Does the same hold true for brands? Every sector, of course, has faced a slightly different set of circumstances and has had to respond in appropriate ways to the crisis. In the travel sector in particular, many boards have been faced with unenviable decisions – particularly in respect of human capital – and are now being tried in the court of public opinion.

What is clear from our social media analytics (reported in this document) is just how divergent consumer reaction has been to the behaviour of brands – even within individual sectors.

This is true not only for big policy calls, but also for marketing communications. Our research this week shows that while adverts that highlight the crisis have some resonance with the most COVID concerned segments, they also risk alienating much of the population – especially those who are most likely to be re-engaging with the economy. There is a desire for normality and a wariness of brands who look as though they may be ‘virtue signaling’.

So here we are then. Twenty-one eventful weeks after we started, this is the final edition of our weekly tracking reports in their current format.

This is certainly not ‘goodbye’ – we’re just taking a short period of time out to listen to feedback (yes, we do try to practice what we preach!), and plan an updated format for tracking the behaviour and attitudes of consumers and businesses, as we enter the next chapter for a recovering UK economy.

For now, thank you so much for engaging with our analysis during this period. Even though the headlines have often been sobering, we hope you’ve enjoyed reading the reports as much as we’ve enjoyed putting them together!

With our very best wishes,

Matt Costin
Managing Director, BVA BDRC

Suzy Hassan
Managing Director, Alligator Digital

Executive Summary

National mood and sentiment picks up

After the most negative outlook recorded since April in last week's report, there is a slight improvement in overall mood and sentiment this time. Confidence in the UK government's handling of the crisis recovers somewhat – but 85% of the population considers a 2nd wave and lockdown to be a likely scenario.

Consumers are feeling better about their finances than at the start of the crisis

Notwithstanding the growing incidence of redundancies, pay cuts and reduced-time contracts, consumers are typically feeling somewhat better about their personal finances than at the very start of the crisis. 37% now describe themselves as 'alright' and a further 9% as 'better off than before (the crisis)' – on a combined basis, this is up 10 points since early April. For historical context, when BDRC asked the same questions during the aftermath of the 2008 financial crisis, only 27% described themselves as 'alright' or 'better off'.

Advertising: consumers show preference for 'normality' and an absence of virtue signalling

When it comes to marcoms strategy, this week's report underlines the importance of pitching the right message to each audience. At an aggregate national-level, there is a sense that ads should focus more on a return to normality than on COVID-related safety and wellbeing messages – though these COVID-related themes continue to resonate for those in the 'COVID Concerned' attitudinal segment. In general, consumers are also cynical about brands publicising their good deeds during the crisis, with 'Life Goes On' and 'Pragmatic Policy Supporters' (also the segments most likely to be re-engaging with the economy) particularly likely to be turned off by virtue signalling from brands.

Outdoor scenic destinations lead our recovery index - but have flat-lined since July

A combination of the good mid-summer weather, avoidance / impossibility of international holidays, as well as an innate desire for space and clean air post-lockdown, contributed to outdoor scenic areas racing ahead in terms of the extent of recovery in visitors / customers. In August, however, recovery in participation levels has flat-lined, with no further increase in the incidence of visitors among our 'Travel Activist' sample.

Restaurants, pubs and shopping malls continue to see growth in re-engagement

For pubs, shopping malls and restaurants in particular, we continue to see week-on-week increases in the incidence of participation – the latter helped, it seems, by the *Eat Out to Help Out* scheme. Meanwhile, the reduction in VAT would also appear to have had an impact on uptake of paid-for accommodation, though not to the same extent as EOTHO: a case for "Stay Away to Save the Day" perhaps?

Bleak outlook for outbound travel, as lead-times lengthen again in face of quarantine

Despite being in peak summer holiday season, we estimate that the incidence of those taking overseas holidays among our 'Travel Activist' sample is just 7% of that recorded in Q1. With anticipated lead times to next flight and international holiday lengthening for the second consecutive week and no sign of an end to the uncertainty around quarantine rules, the outlook for international travel continues to be bleak. Among those who are planning to go on an overseas holiday, the hierarchy of holiday type preferences remains largely unchanged, with Spain top of the destination charts and beaches still top of the menu.

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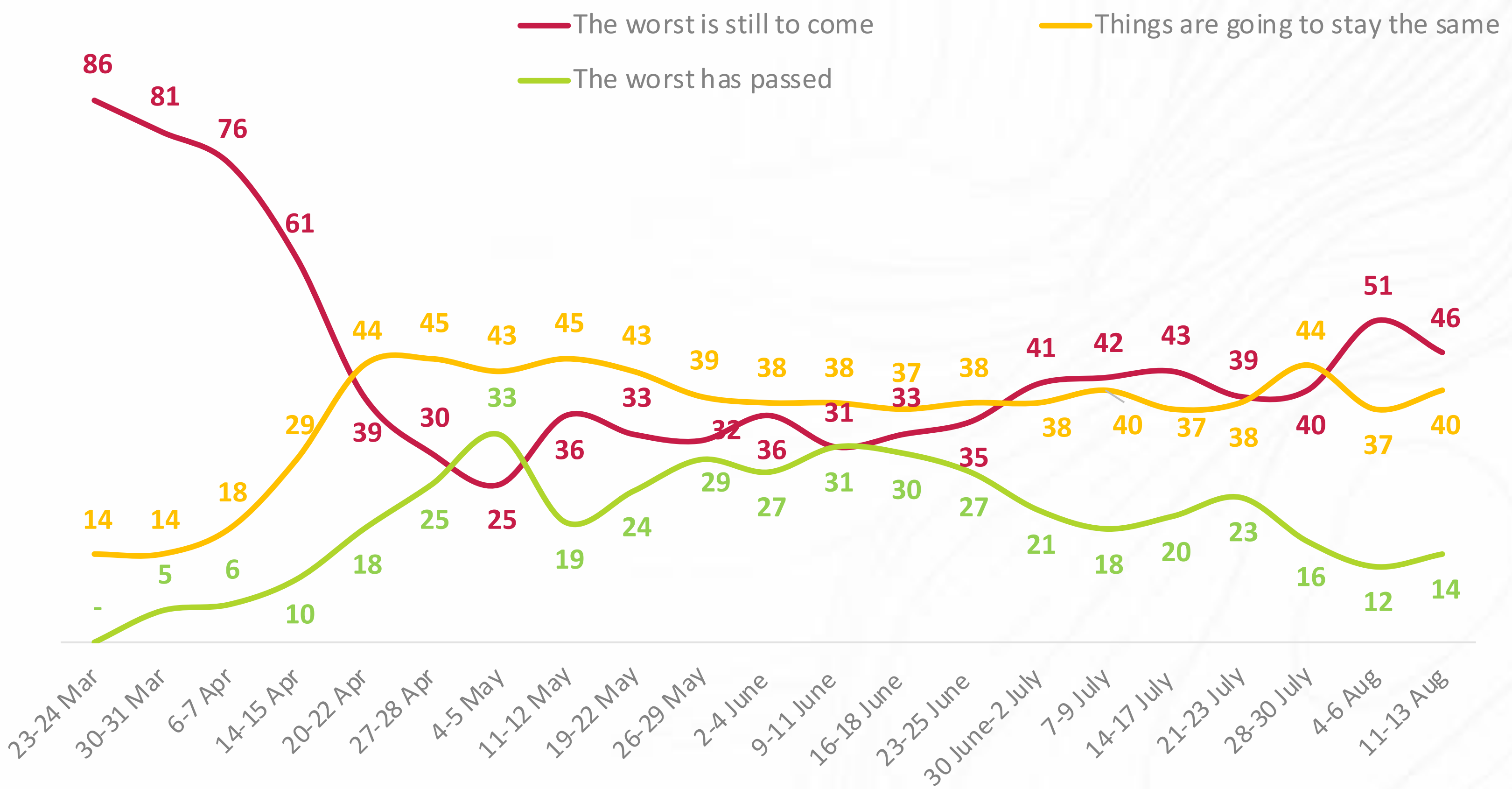
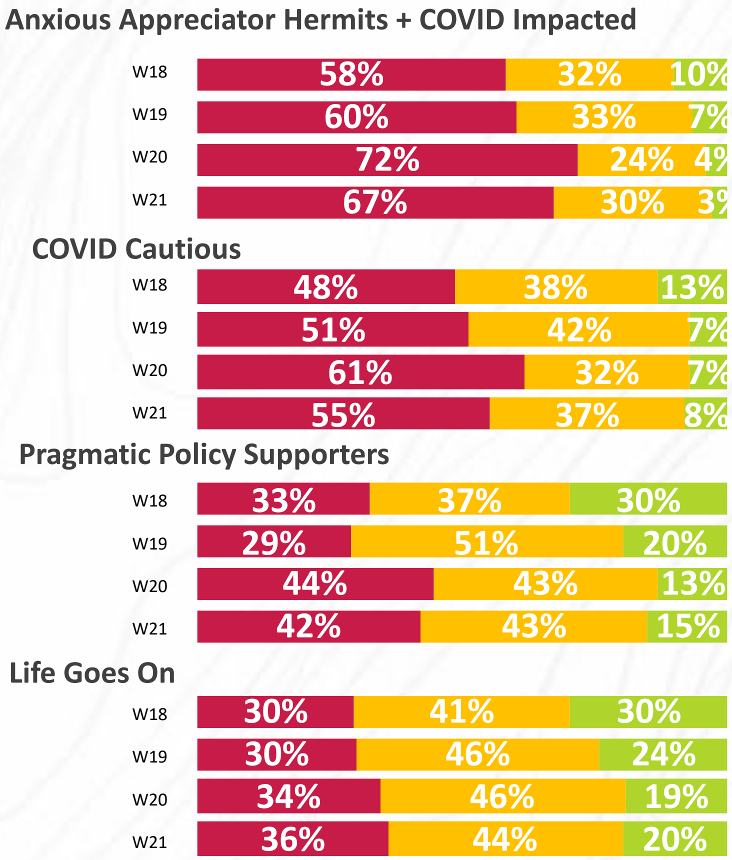
The mood of the nation

We are somewhat less pessimistic than last week, but the plurality of UK adults fear that the worst is still to come and only 14% believe the worst has passed.



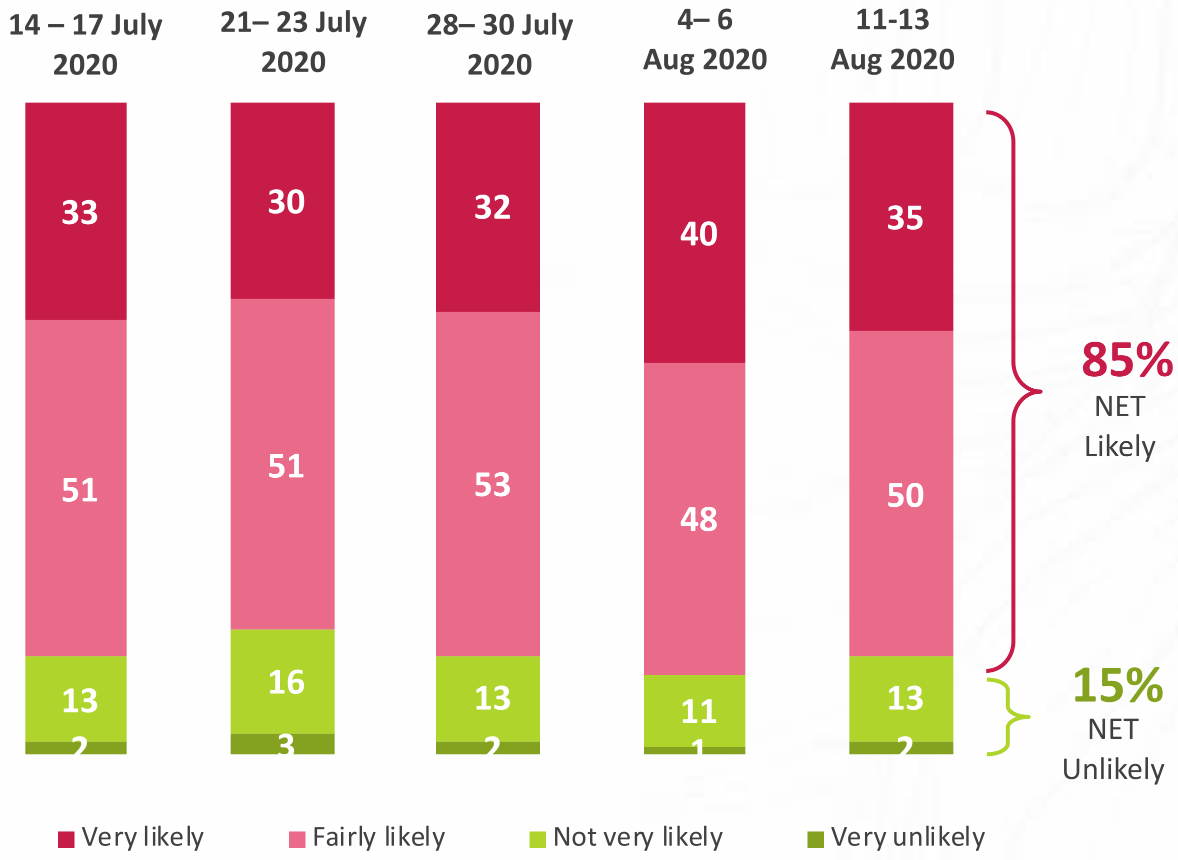


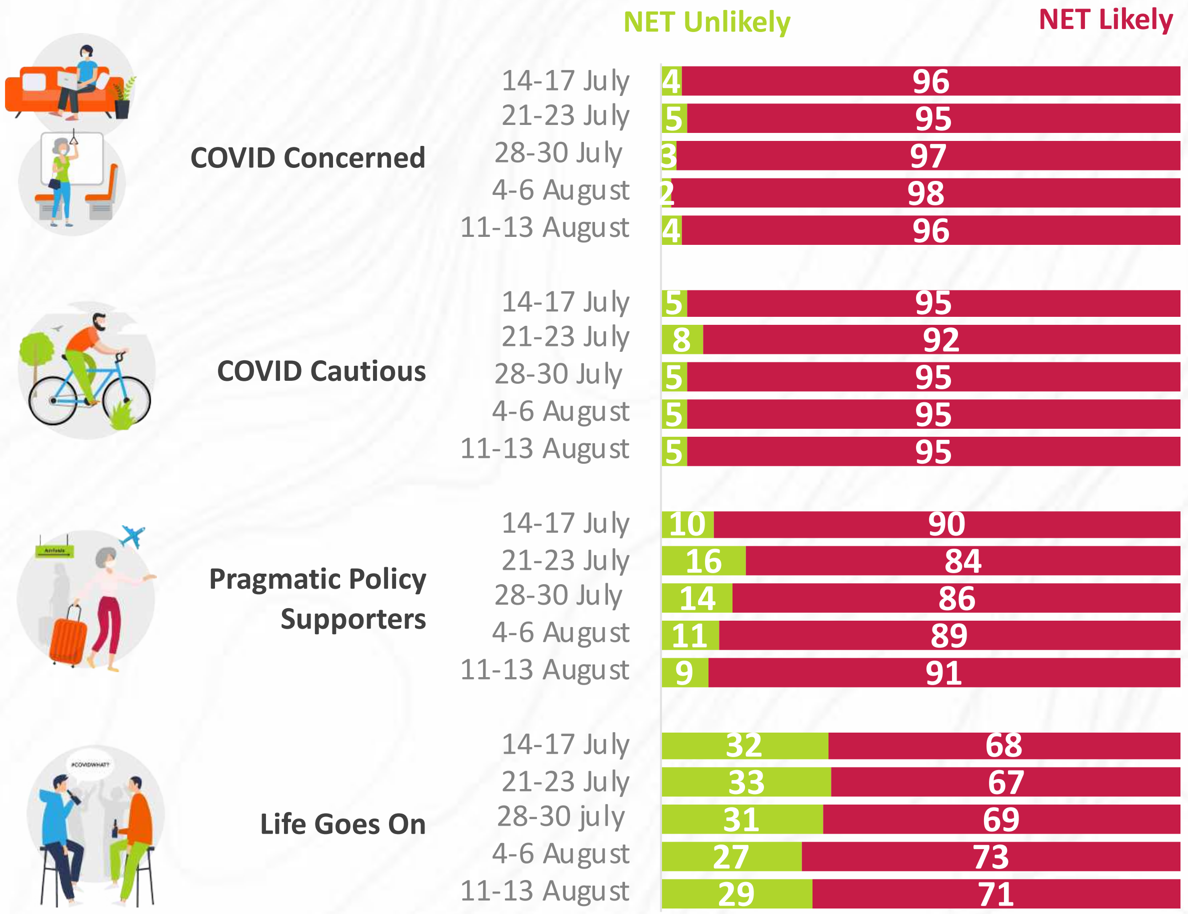
Q7: Regarding the situation of Coronavirus in the UK and the way it is going to change in the coming month, which of the following best describes your opinion? (%)

Fears of a 2nd wave / lockdown recede slightly this week, but 85% still consider it 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?

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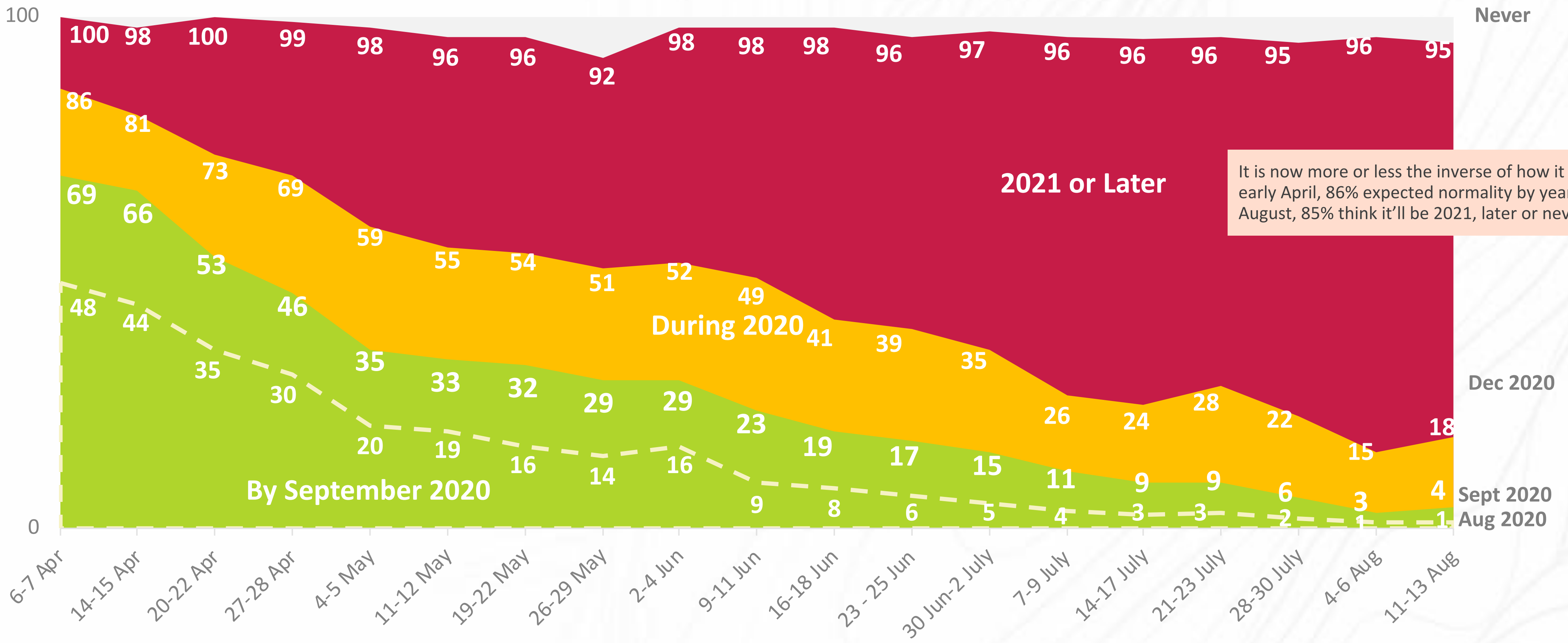
At the start of tracking in April, all but a 'pessimistic' 14% expected normality by year end. Now, all but an 'optimistic' 18% fear that normality will come in 2021 or later.



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?

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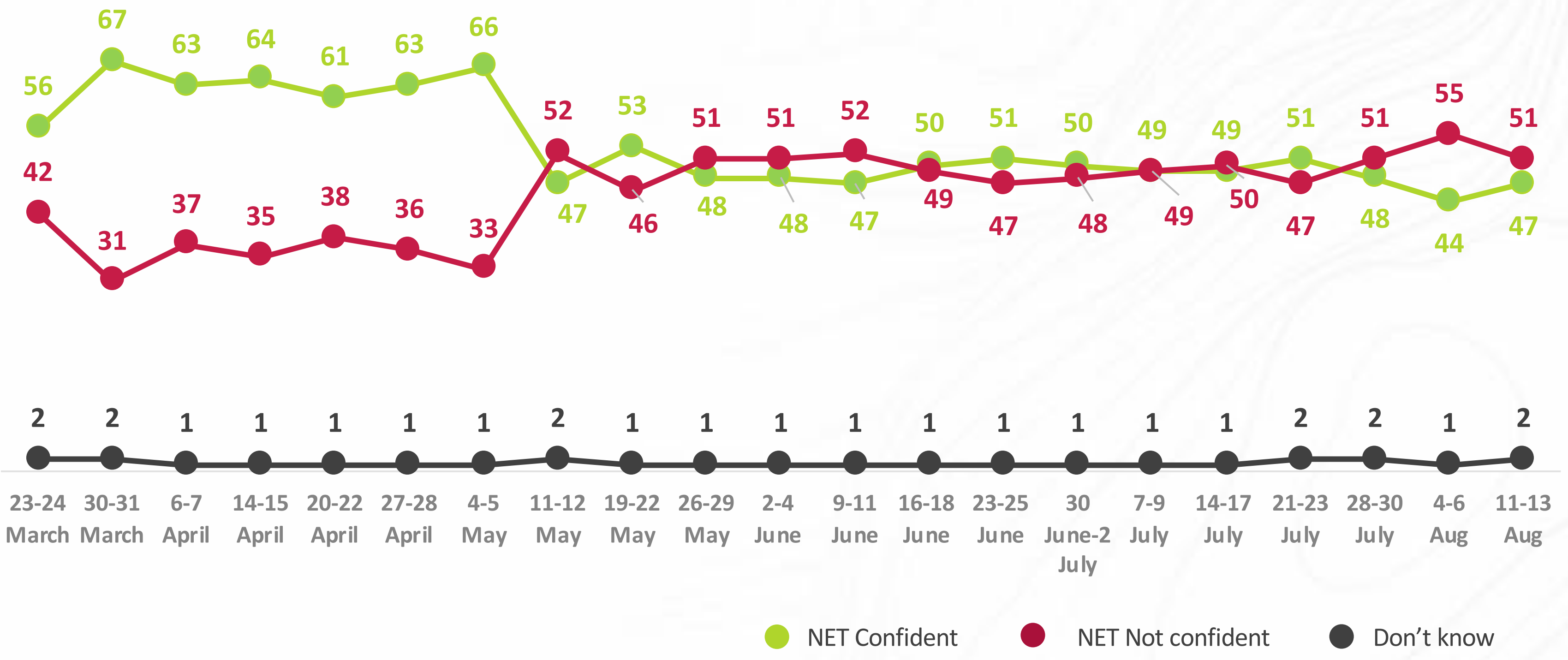
Confidence in the UK government's handling of the crisis recovers slightly this week. A narrow majority of adults, however, are 'not confident'.

Since last month, opinions on the government's handling of the crisis have become even more entrenched along voting lines, with Conservative voters becoming more positive, and Labour and Liberal Dem voters becoming even less confident.

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? (%)



	% of each party's voters at last general election that are confident in the UK Government's handling of the crisis 1 Month change in brackets (comparing to 14th – 17th July)
Conservatives	72% (+6)
Labour	30% (-4)
Liberal Democrats	29% (-2)

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

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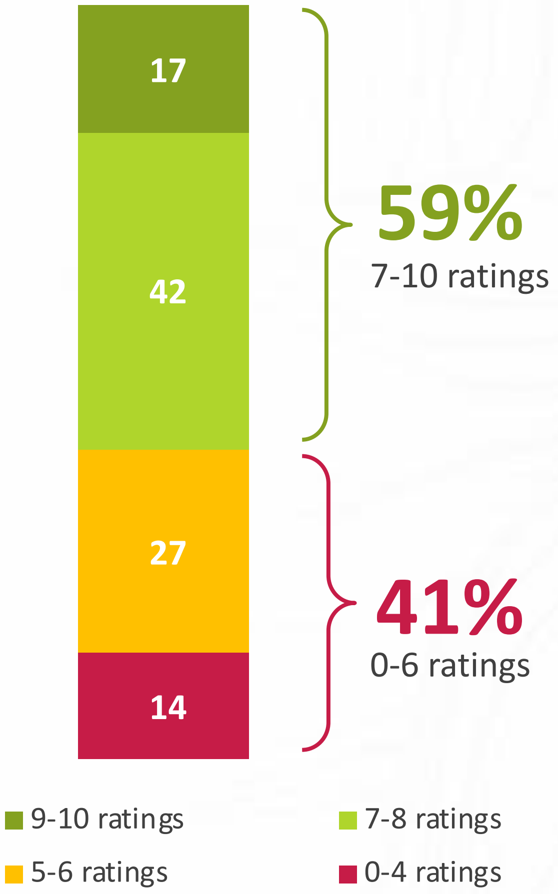
Since late-April, our average national mood has hovered between 6.6 and 6.7 on a 10 point scale – in line with other indicators, it picks up slightly this week.

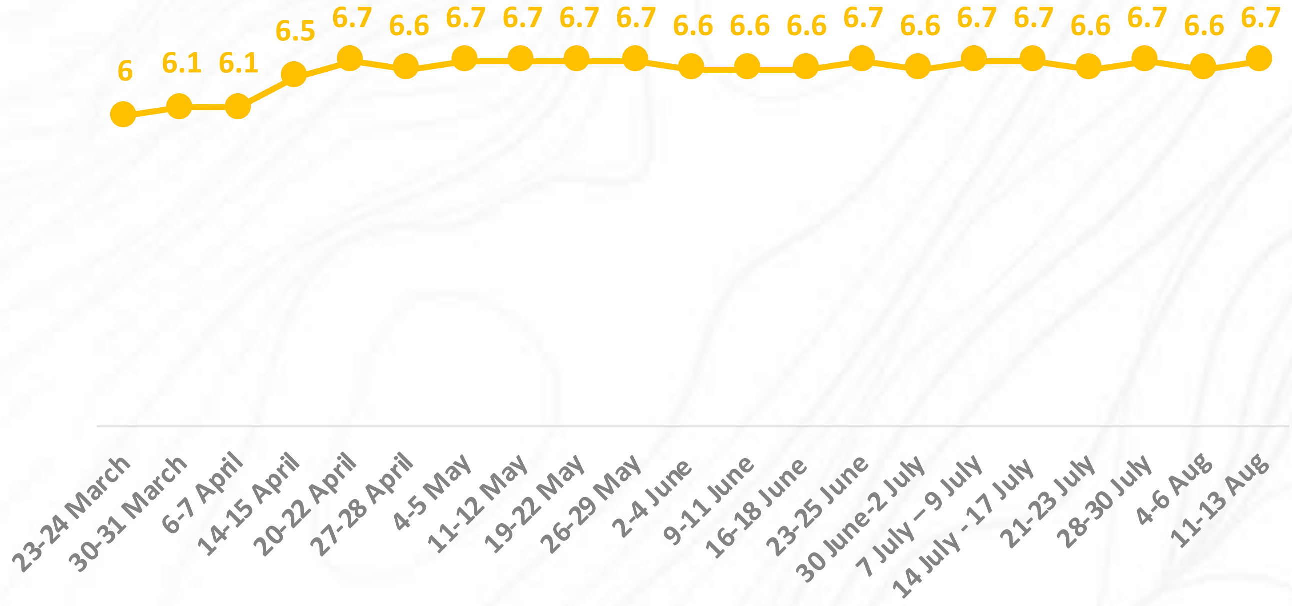
11 Aug– 13 Aug 2020

Average mood

6.7



Average mood week-on-week (UK Adults)



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

Communicating to our COVID attitudinal 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

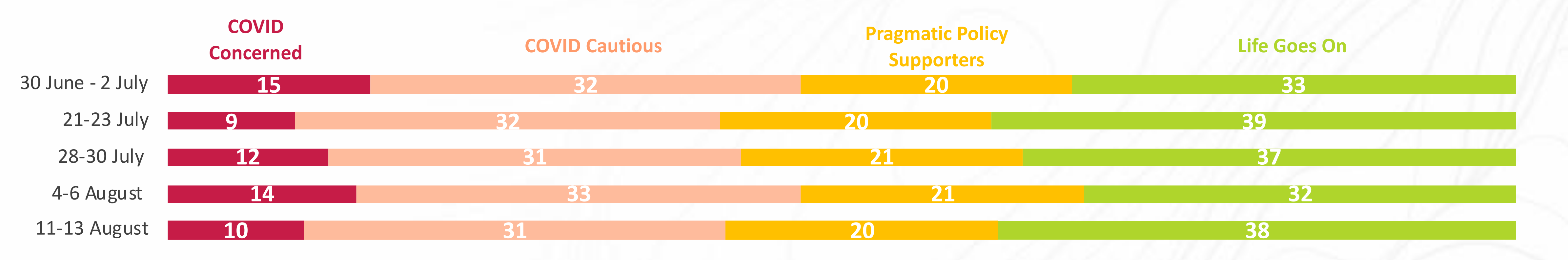
While they are less concerned about the impact of the pandemic on themselves, this segment fears that we may not yet be past the worst and would prefer a longer lockdown. They are likely to be cautious in their own post-lockdown behaviour.

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

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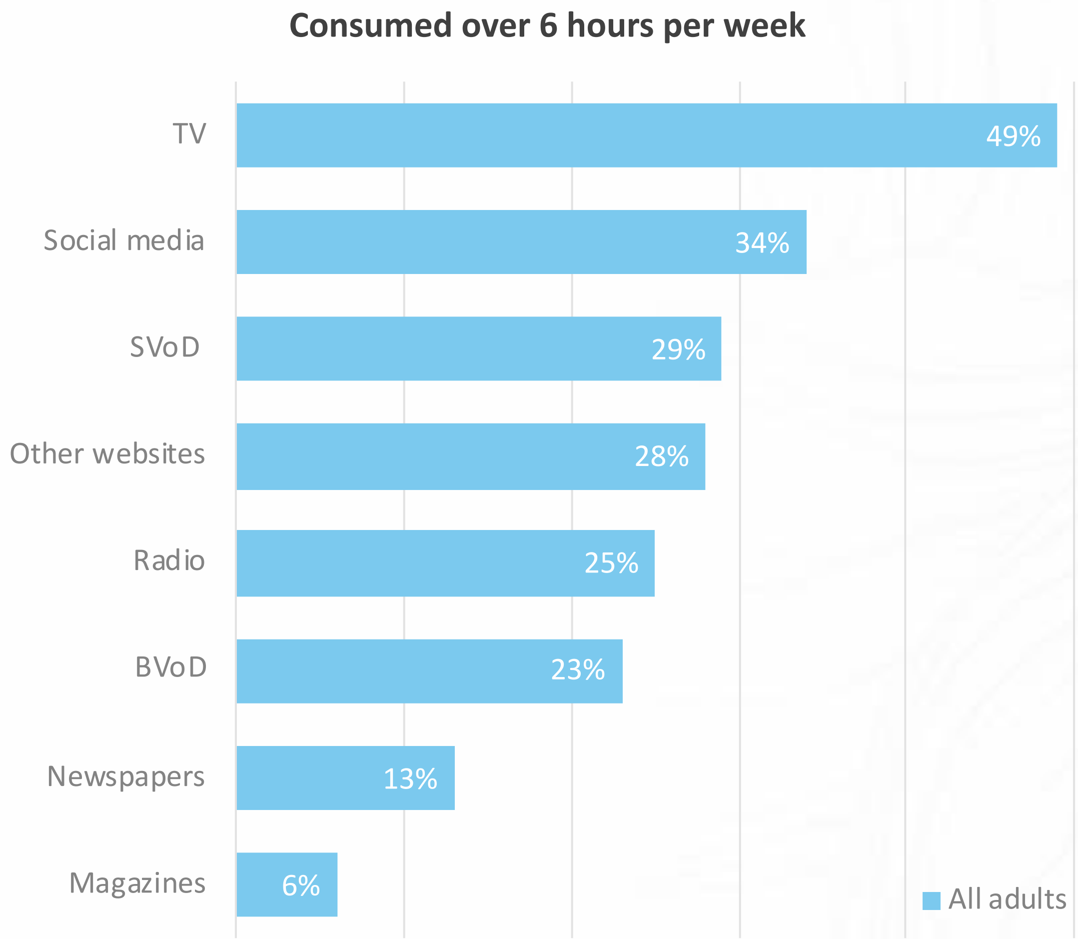
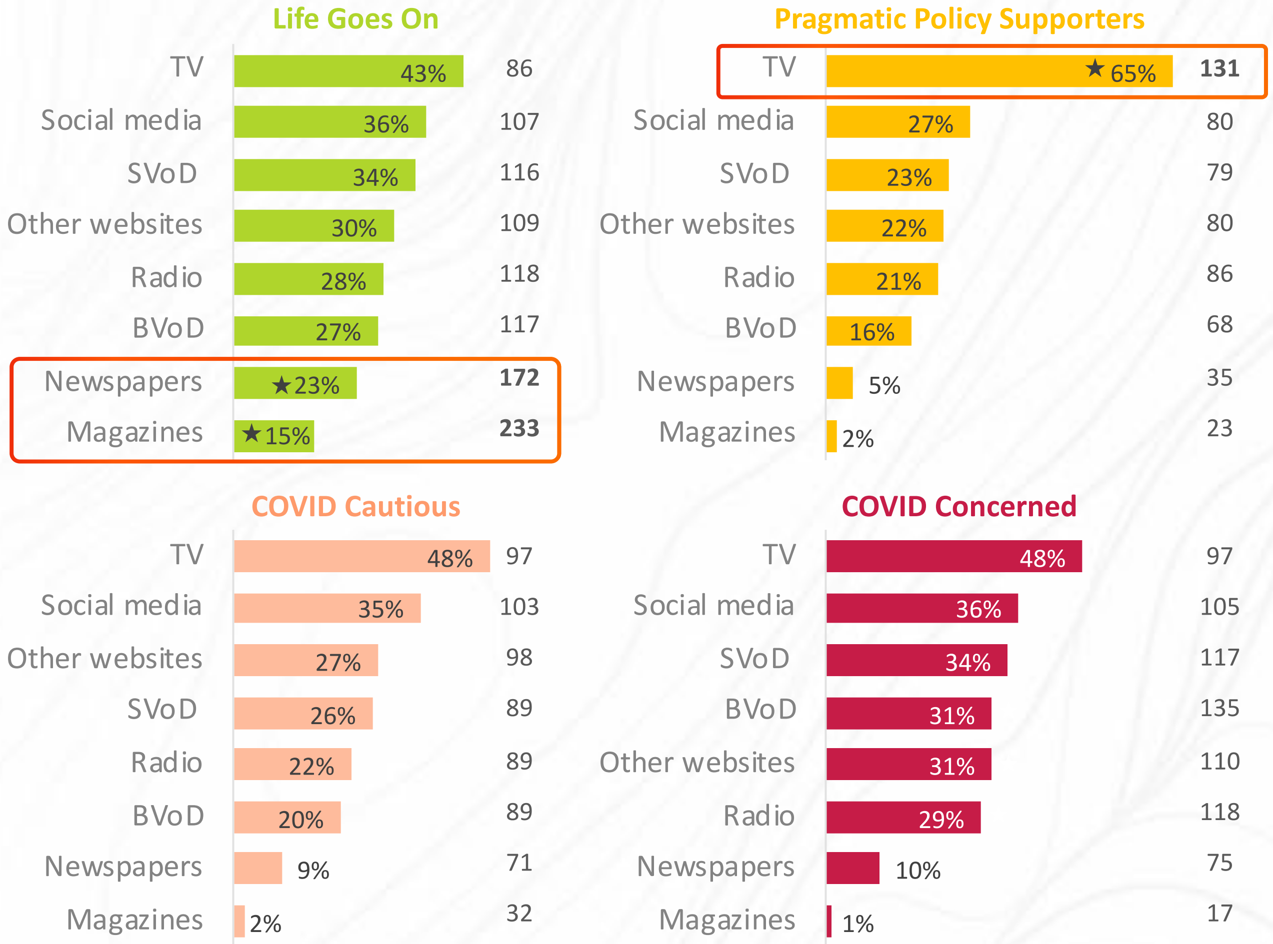
Media preferences correlate with attitudes to COVID-19.

Print consumers are more likely to fall into the Life Goes On segment, whilst heavier TV consumers are more likely to be Pragmatic Policy supporters.



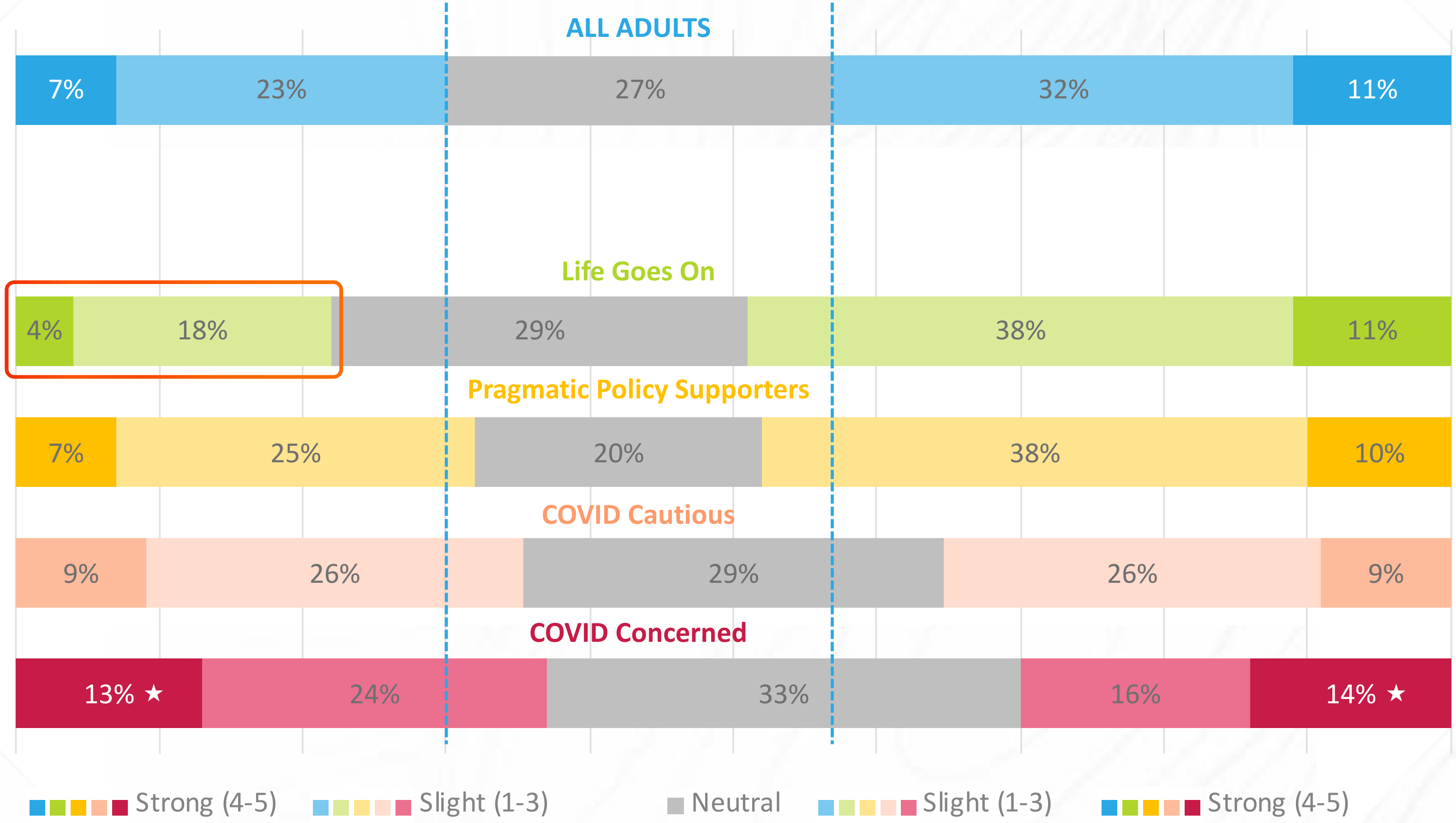


Q78 - In a typical week, approximately how many hours do you spend...? ★ = top segment Base: 552

Ads that highlight the crisis risk alienating Life Goes On segment.

The sense that ads should focus more on a return to normality prevails amongst all but the cautious Covid Concerned segment.

*"Advertising currently should primarily **highlight the Covid 19 crisis** where appropriate and **focus on safety and wellbeing** messages"*



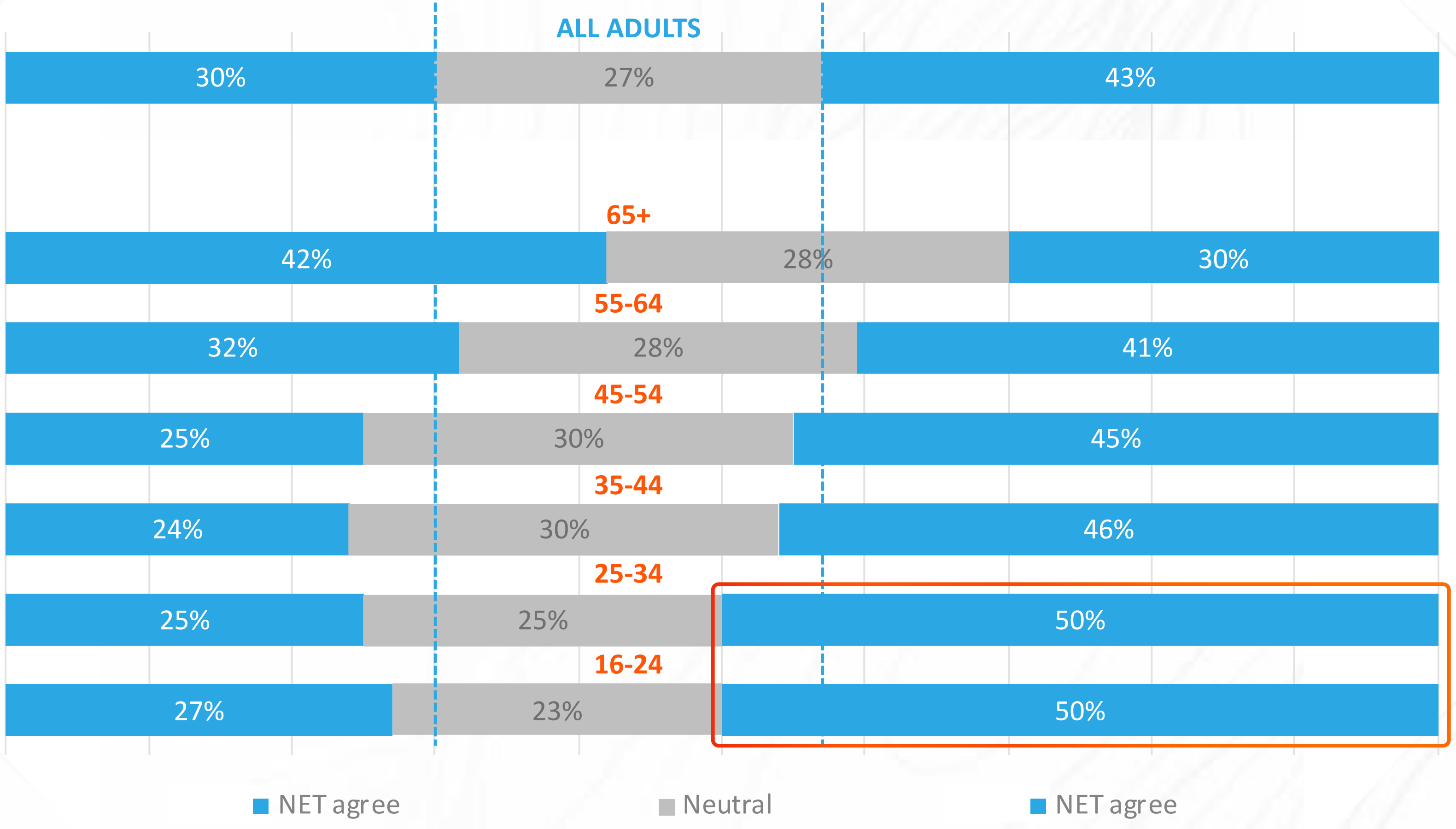
*"Advertising currently should primarily focus on things **returning back to normal** and **not make any reference to Covid 19**"*

q79- On the scale below please indicate to what extent your opinion lies closer to the statements on the left or those on the right. The more firmly you agree with one statement the further towards that statement you should score. If you agree with both equally, score in the middle. ★ = top segment Base: 1,001 (379, 203, 310, 109)

Under 35s have the strongest desire for normality in advertising.

Primarily it's the over 65s that feel advertising should focus on safety and wellbeing messages.

"Advertising currently should primarily **highlight the Covid 19 crisis** where appropriate and **focus on safety and wellbeing** messages"



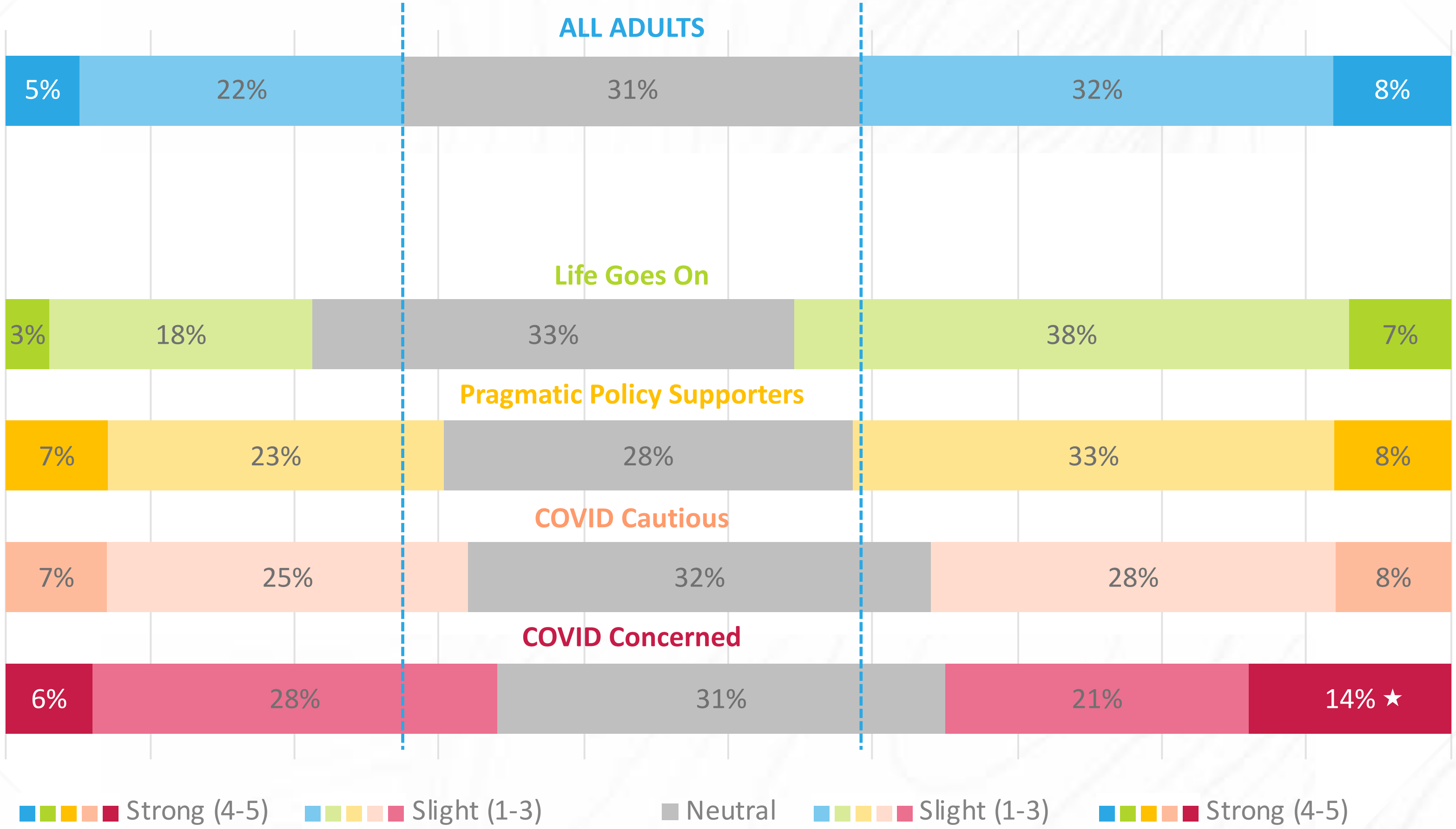
"Advertising currently should primarily focus on things **returning back to normal** and **not make any reference to Covid 19**"

q79- On the scale below please indicate to what extent your opinion lies closer to the statements on the left or those on the right. The more firmly you agree with one statement the further towards that statement you should score. If you agree with both equally, score in the middle. ★ = top segment Base: 1,001 (216, 116, 158, 156, 198, 157)

People tend to be cynical about brands ‘virtue signalling’.

Publicising good deeds could prove effective for cautious segments, but is likely to be a turn-off for Life Goes On segment.

“Adverts that publicise a brand doing good deeds during the crisis are ***more effective*** *than regular ads”*



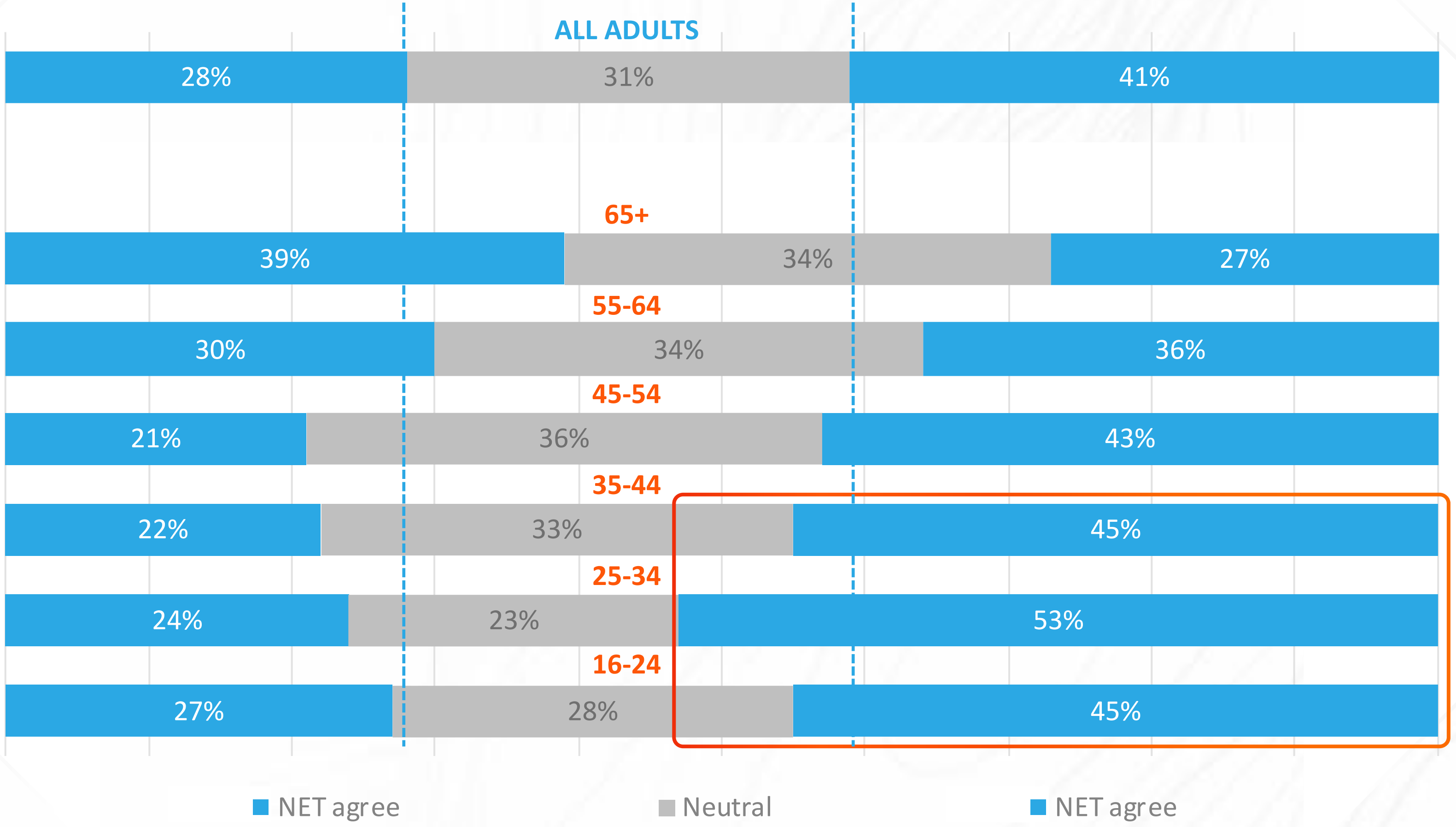
“Adverts that publicise a brand doing good deeds during the crisis are ***cynical, opportunistic and less effective****”*

q79- On the scale below please indicate to what extent your opinion lies closer to the statements on the left or those on the right. The more firmly you agree with one statement the further towards that statement you should score. If you agree with both equally, score in the middle. ★ = top segment Base: 1,001 (379, 203, 310, 109)

Under 45s are most likely to be cynical about ads publicising good deeds.

Again it's 65+ age groups who are more likely to find good deed messaging effective.

“Adverts that publicise a brand doing good deeds during the crisis are **more effective** than regular ads”

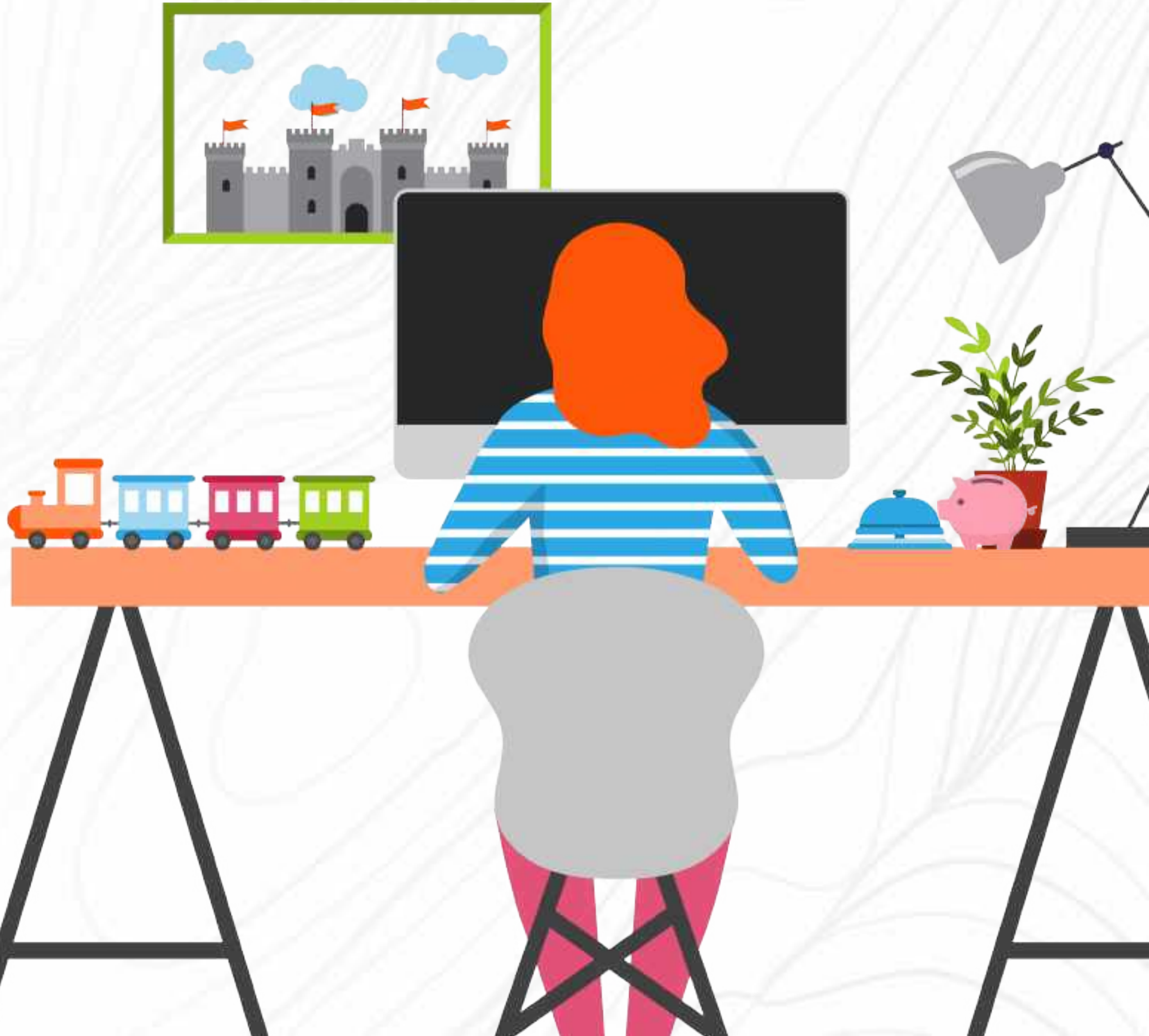


“Adverts that publicise a brand doing good deeds during the crisis are **cynical, opportunistic and less effective**”

q79- On the scale below please indicate to what extent your opinion lies closer to the statements on the left or those on the right. The more firmly you agree with one statement the further towards that statement you should score. If you agree with both equally, score in the middle.

★ = top segment Base: 1,001 (216, 116, 158, 156, 198, 157)

Tracking recovery across key segments



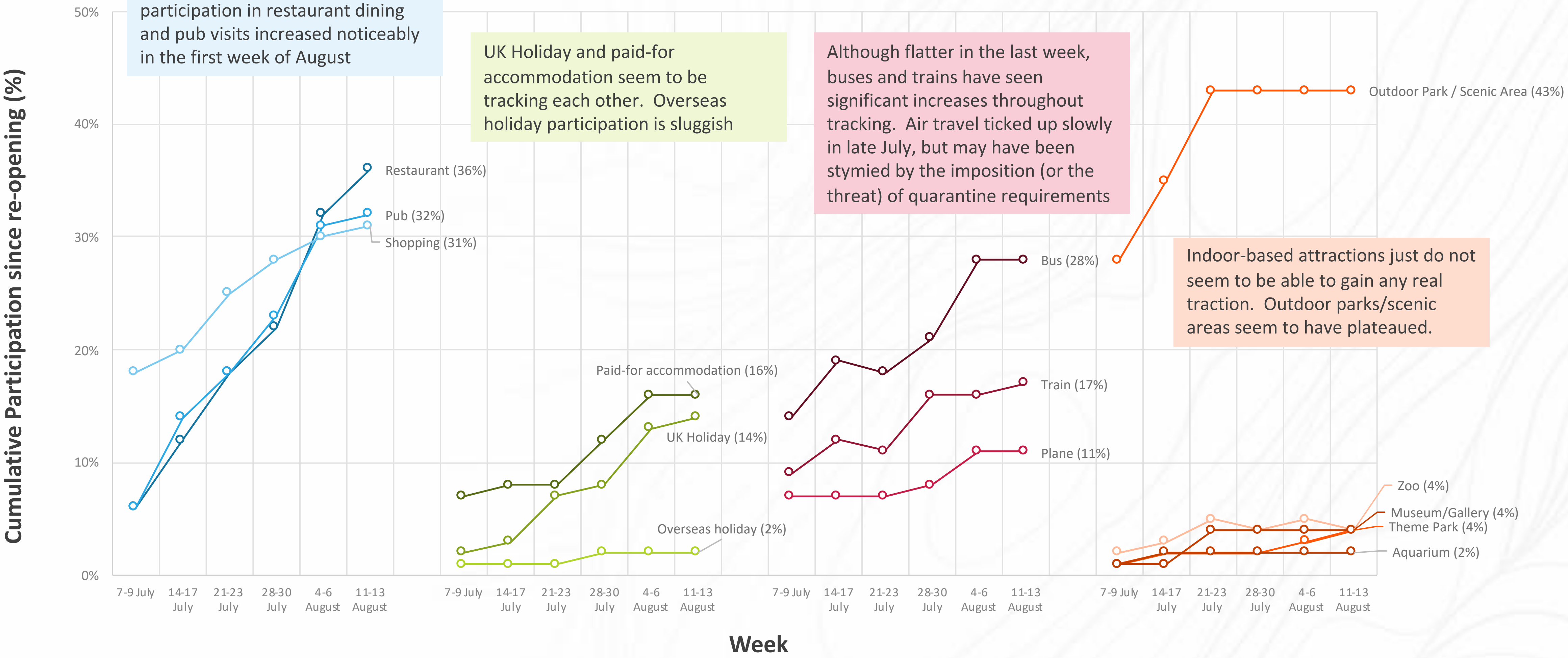
Outdoor parks / scenic areas galloped into an early lead in the recovery stakes – but have flat-lined in August. Restaurants, pubs and retail continue to record momentum in participation recovery.

The cumulative percentage of participation in restaurant dining and pub visits increased noticeably in the first week of August

UK Holiday and paid-for accommodation seem to be tracking each other. Overseas holiday participation is sluggish

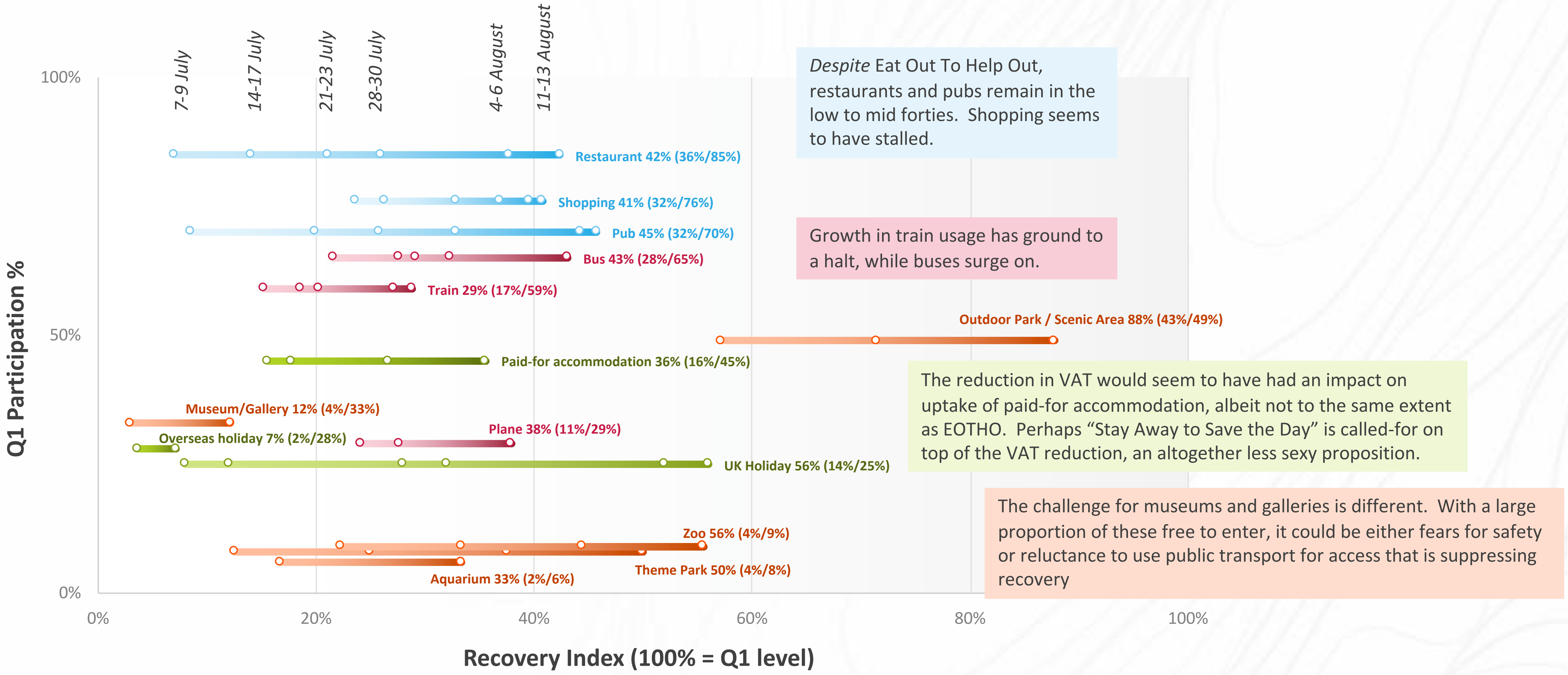
Although flatter in the last week, buses and trains have seen significant increases throughout tracking. Air travel ticked up slowly in late July, but may have been stymied by the imposition (or the threat) of quarantine requirements

Indoor-based attractions just do not seem to be able to gain any real traction. Outdoor parks/scenic areas seem to have plateaued.



Data filtered on Travel Activists – see appendix for details

Only zoos, theme parks, UK holidays and outdoor parks have reached 50% of their Q1 participation levels. Despite continued improvement and support through EOTHO, restaurants and pubs remain in the low to mid 40s.



Data filtered on Travel Activists – see appendix for details

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‘Life Goes On’ and ‘Pragmatic Policy Supporters’ remain ahead of the curve in terms of re-engagement with key leisure segments – though progress is evident across all segments.

While ‘COVID Concerned’ visits to pubs/ restaurants is still some way behind the other segments, they are now almost as likely now to go on shopping trips.

	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
		11-13 Aug	14	24	24	27
	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
		11-13 Aug	11	18	21	23
	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
		11-13 Aug	17	19	26	21

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

The incidence of consumers taking UK holidays since June continues to grow, but still falls below that seen during the off-peak Q1 season. Unsurprisingly, we see limited movement in overseas holidays.

	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	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
		11-13 Aug	3	6	6	7
	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
		11-13 Aug	0	1	1	2
	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
		11-13 Aug	2	4	6	6

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

We see a jump in use of public transport by the COVID Cautious this week, but limited movement for other segments – perhaps with fewer people going into work over the school summer holidays.

	Segment (size)	COVID Concerned (14%)	COVID Cautious (33%)	Pragmatic Policy Supporters (21%)	Life Goes On (32%)
Jan-Mar 2020	Travelled by bus	30%	27%	24%	22%
	Travelled by train	25%	24%	18%	20%
	Travelled by plane	8%	10%	9%	9%

Since June 2020		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
	11-13 Aug	14	15	18	17
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
	11-13 Aug	7	10	8	9
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
	11-13 Aug	1	2	2	2

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

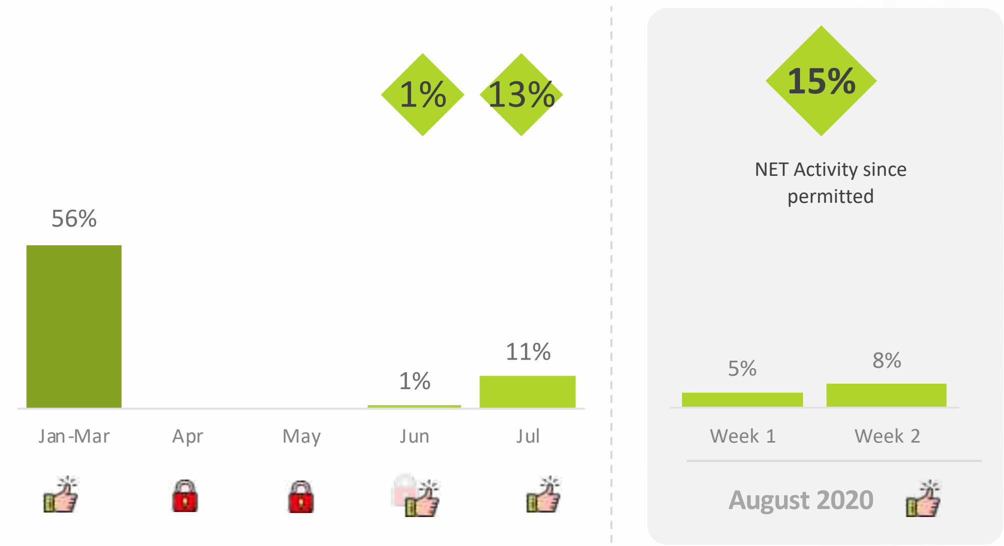
Leisure

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?

The proportion who have already visited an attraction since being able to do so increased in the second week of August. Intentions to go before the end of the year remain steady, while intentions in term of visiting an attraction by the end of April 2021 or later increase.

Visited a visitor attraction since permitted



This week

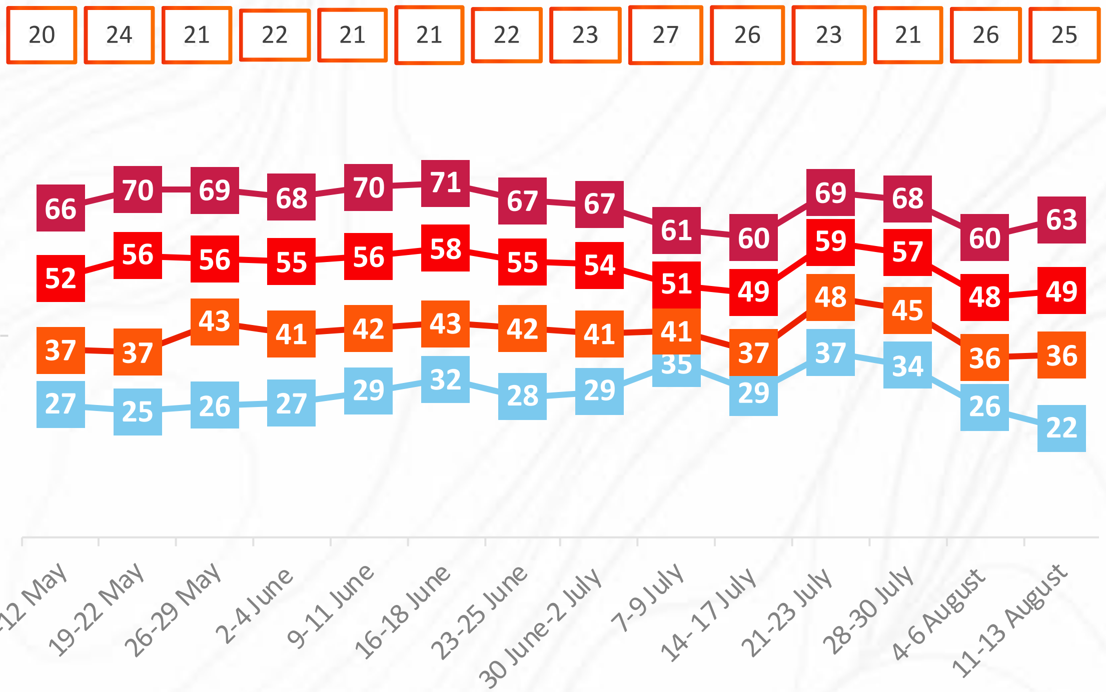
6.2

Average time **since** the activity last done

2.6

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?

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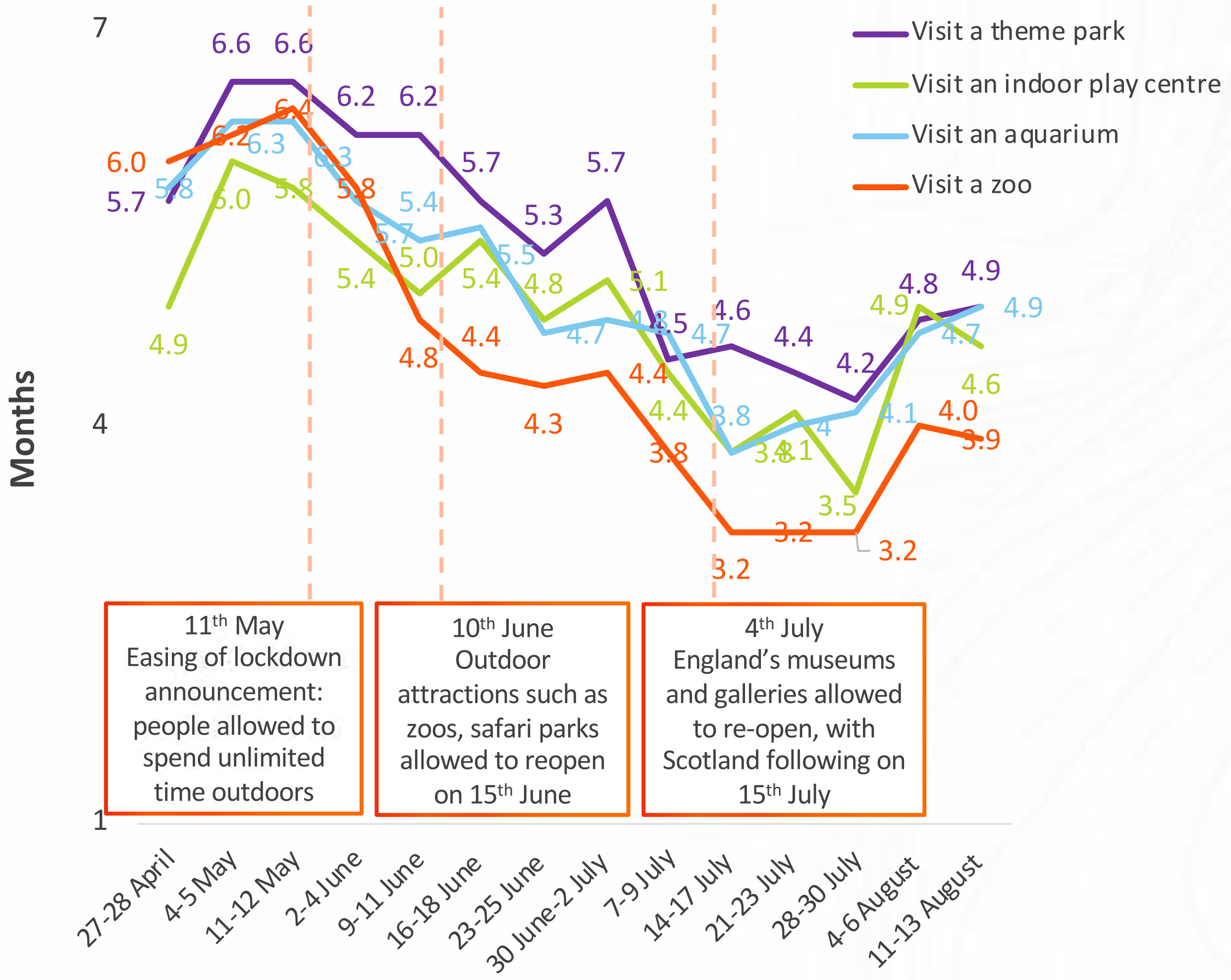
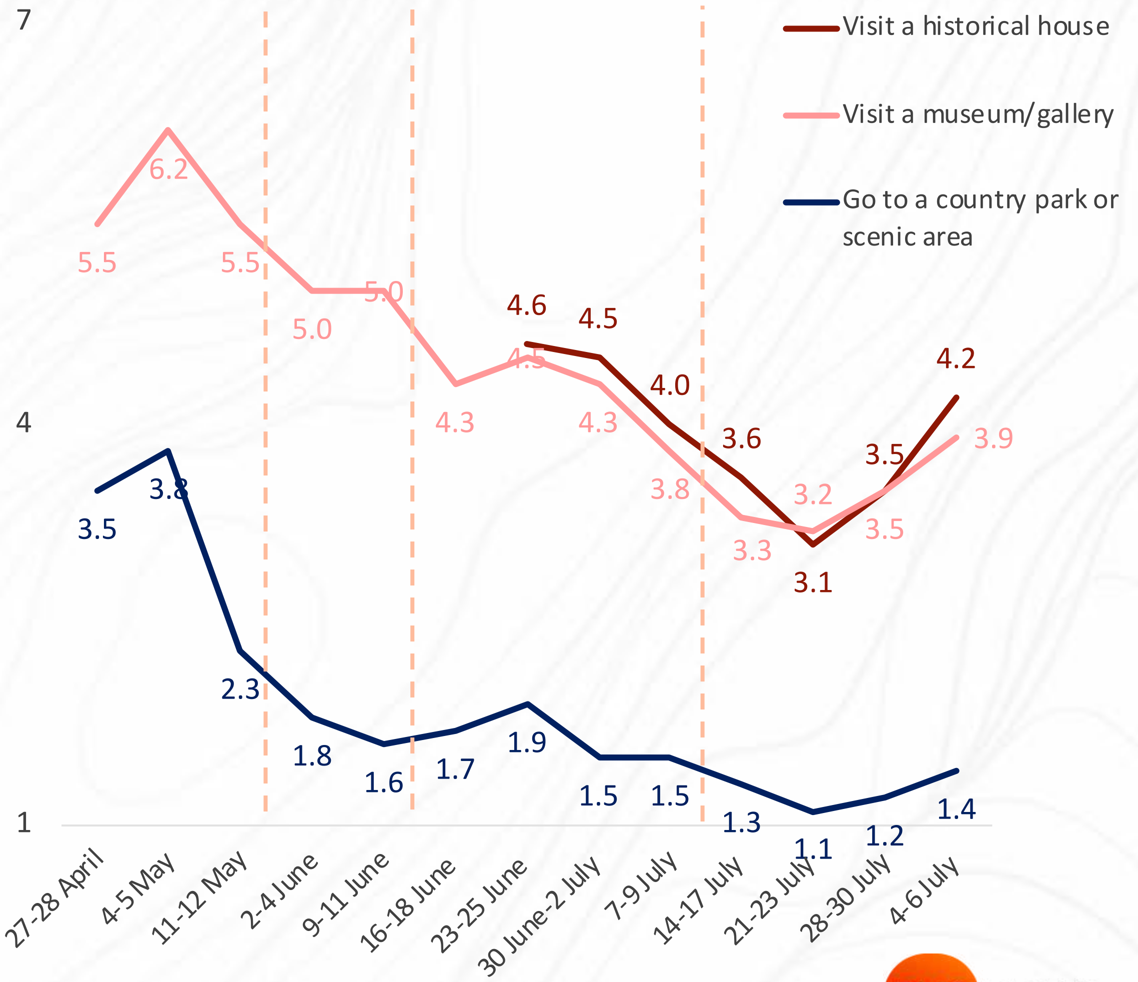
The lead time for most types of attractions continues to increase this week, with historic houses seeing the largest increase. Indoor play centres, however, see lead times drop as families are excited to see them begin to re-open.

Average time before undertaking leisure activities





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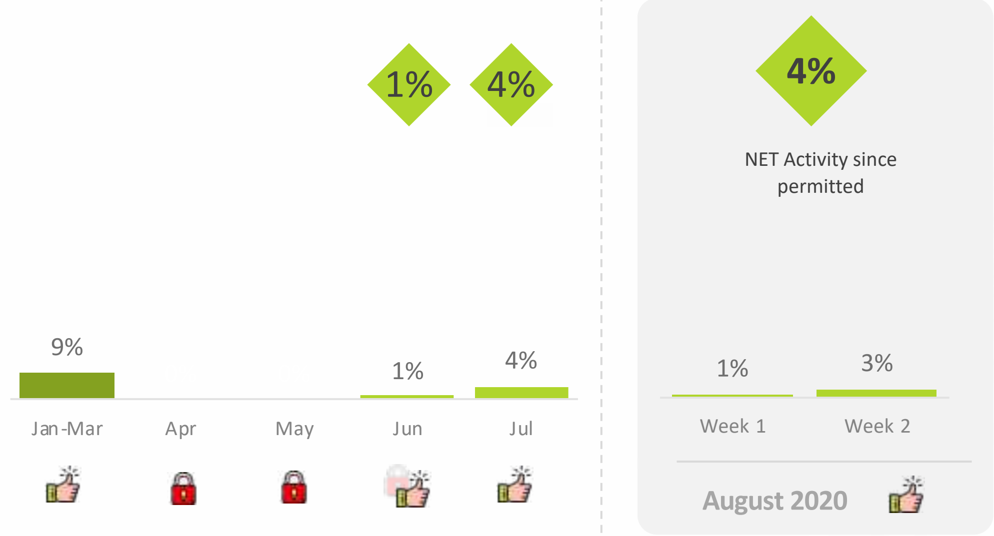
Market Recovery Tracking: Visit a zoo

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

The intention to visit a zoo by the end of September continues to drop, falling from 11% to 9%. Intention to go by the end of April or later also continues to drop, falling from 27% to 19%, the lowest level recorded.

Visited a zoo since permitted



This week

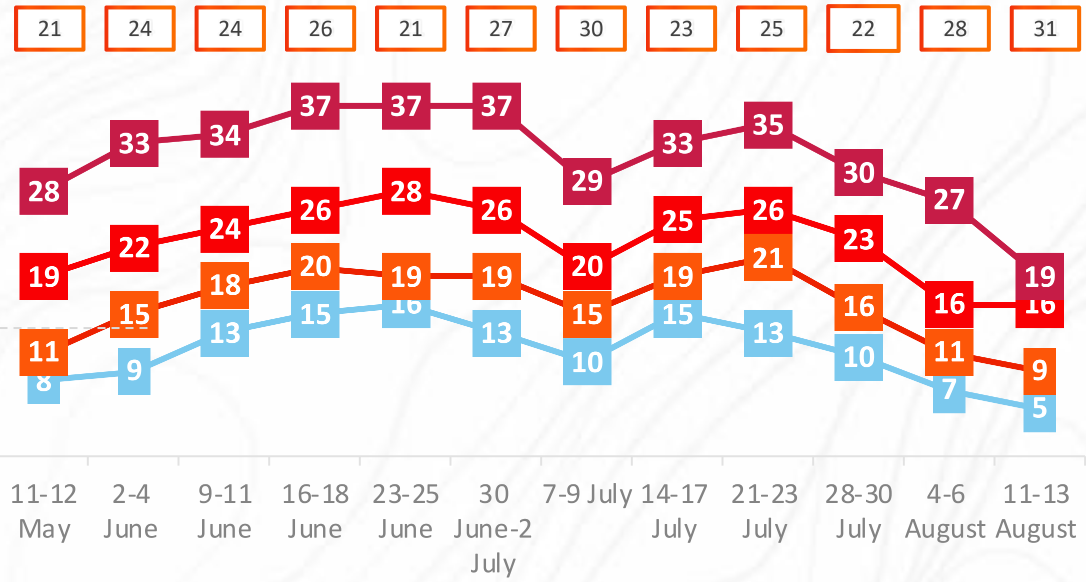
8.2

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

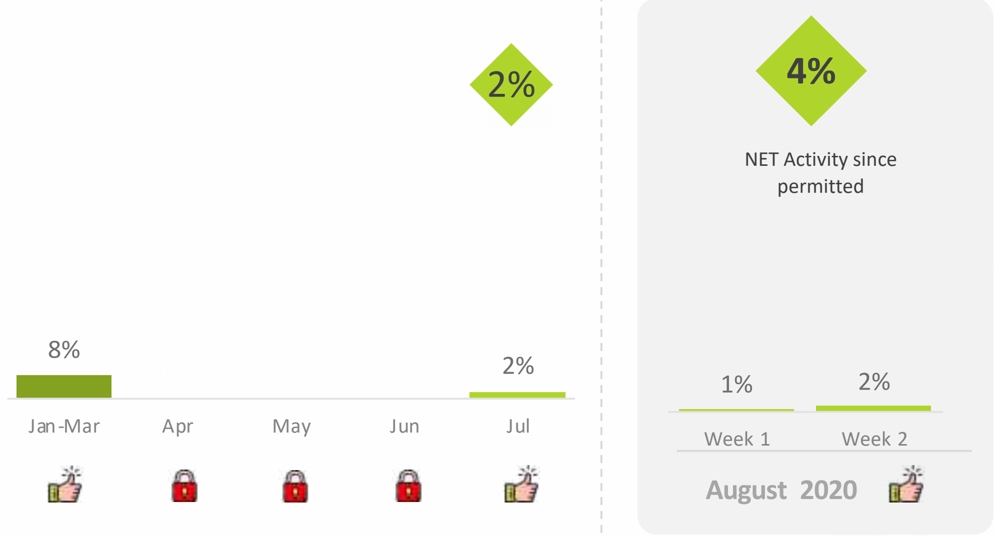
q12bnew. And when do you anticipate next doing the following? Base all
Q1a. And when exactly was the last time you did the following activity/activities?

Market Recovery Tracking: Visit a theme park

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

Theme parks are another segment of the leisure industry impacted by second wave concerns: the proportion of Travel Activists having an interest in visiting but without a specific timeframe in mind, continues to nudge upwards, while short term intentions for August decline for the 3rd consecutive week.

Visited a theme park since permitted

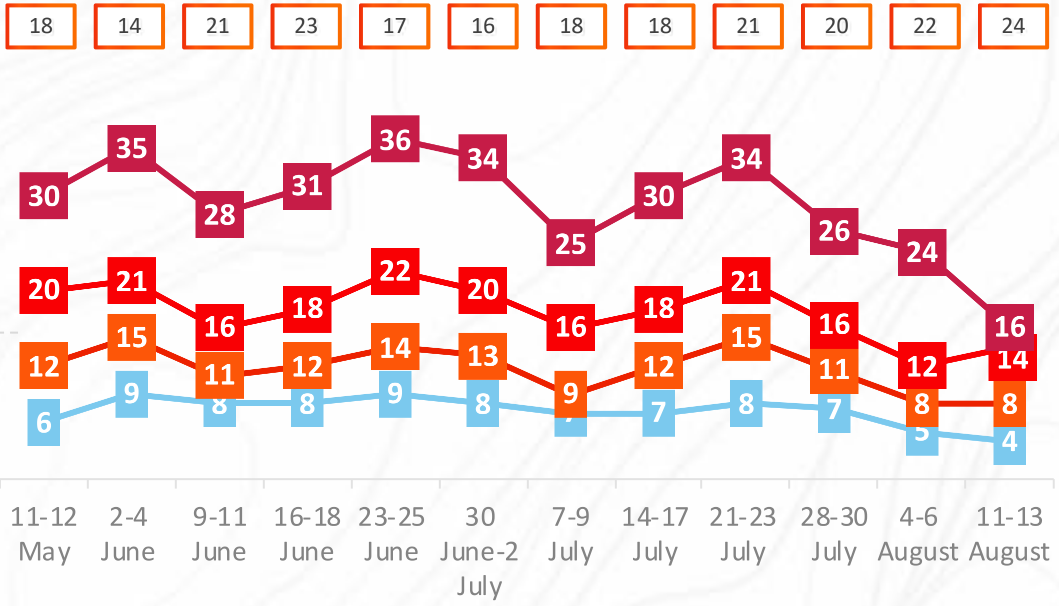


This week

8.6
Average time **since** the activity last done

4.9
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

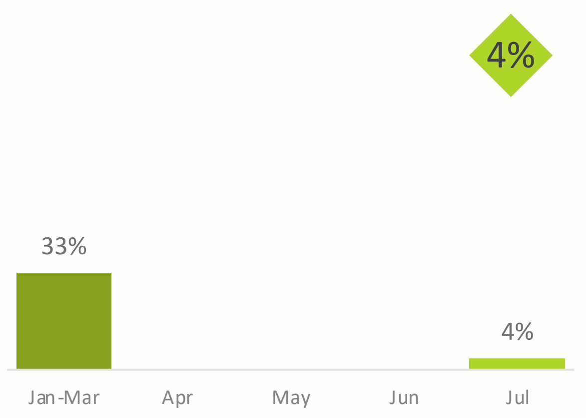
q12bnew. And when do you anticipate next doing the following? Base all
Q1a. And when exactly was the last time you did the following activity/activities?

Market Recovery Tracking: Visit a museum/gallery

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

With last week's data reflecting a peak in consumer anxiety about a potential second wave, and an accompanying sharp drop in intention to visit a museum or gallery before end of 2020, this week there is a partial recovery. Nevertheless, intention to visit this side of 2021 remains lower than it was back in May.

Visited a museum/gallery since permitted



This week

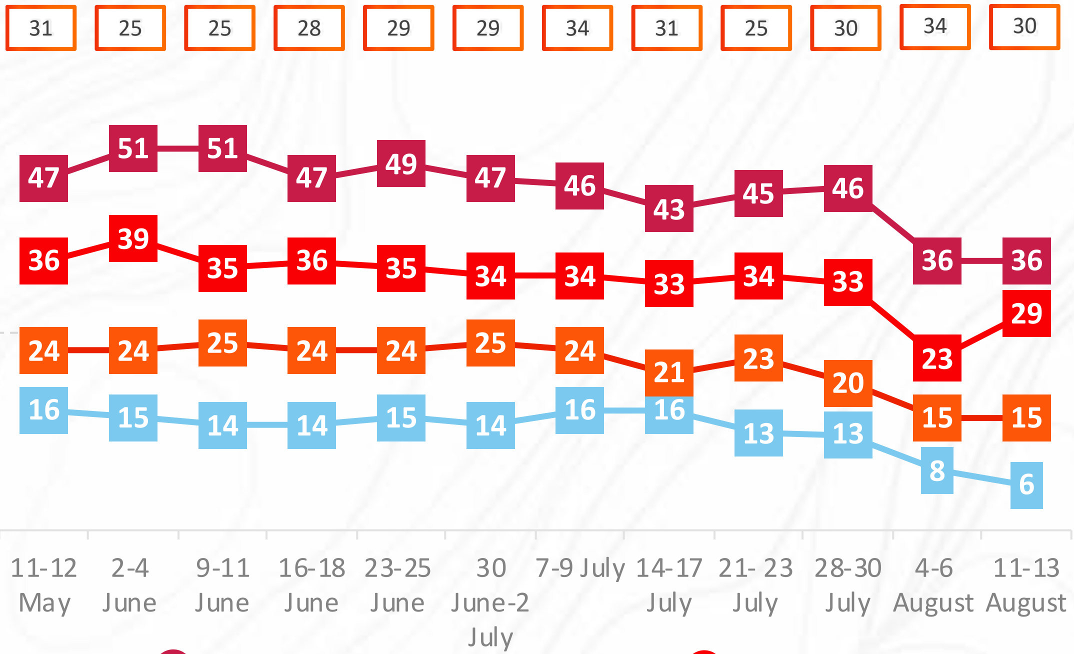
7.7

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

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?

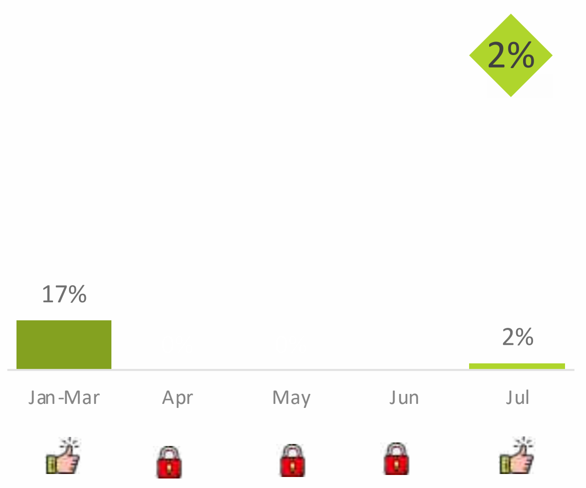
ALLIGATOR BVA BDRC

Market Recovery Tracking: Visit a small historic house

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

In a similar trend to museums, intentions to visit a small historic house before the end of December recovered this week. However, reflecting continued caution in respect of indoor public spaces, the speed of participation recovery remains slow.

Visited a small historic house since permitted



This week

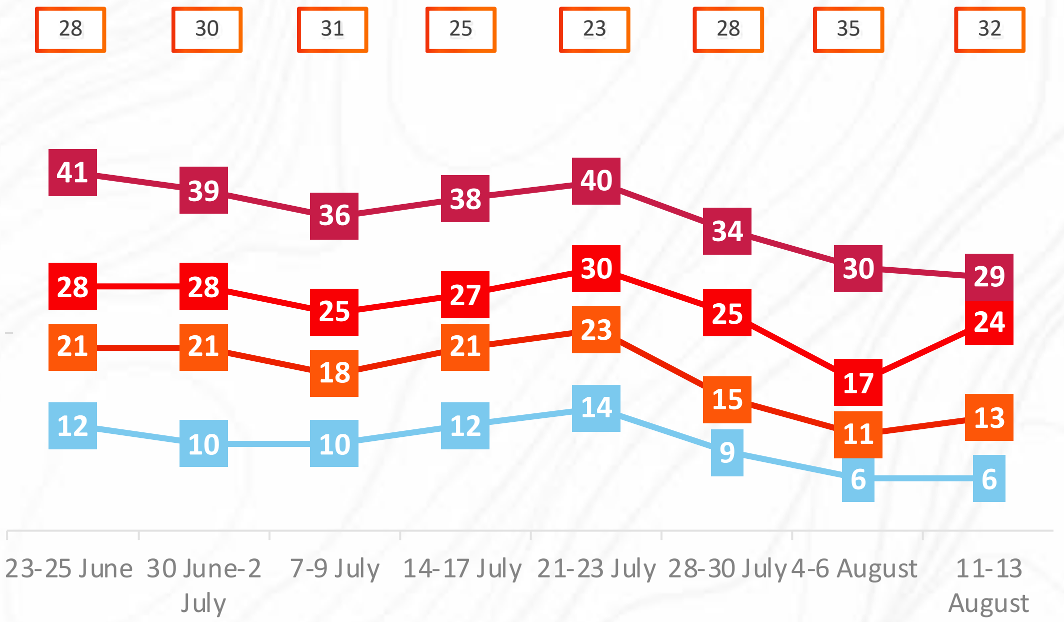
8.4

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?

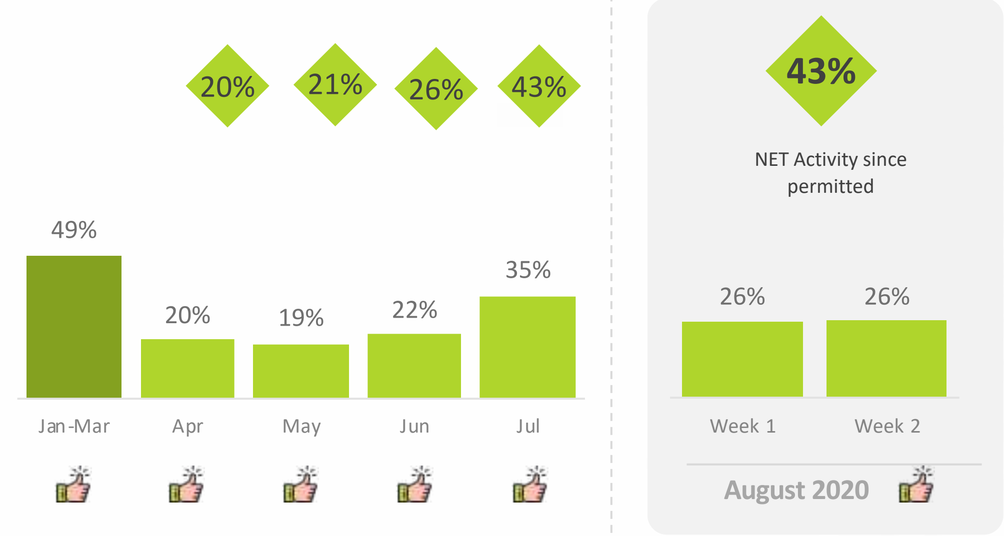
ALLIGATOR BVA BDRC

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?

Outdoor parks and scenic areas recovered faster and to a greater extent than any other section of the economy we have tracked and remain ahead of everything else. That said, the incidence of visitors among our Travel Activist sample is no higher now than it was at the end of July, while forward intentions are on the decline as Autumn comes into sight.

Went to an outdoor park or scenic area since permitted



This week

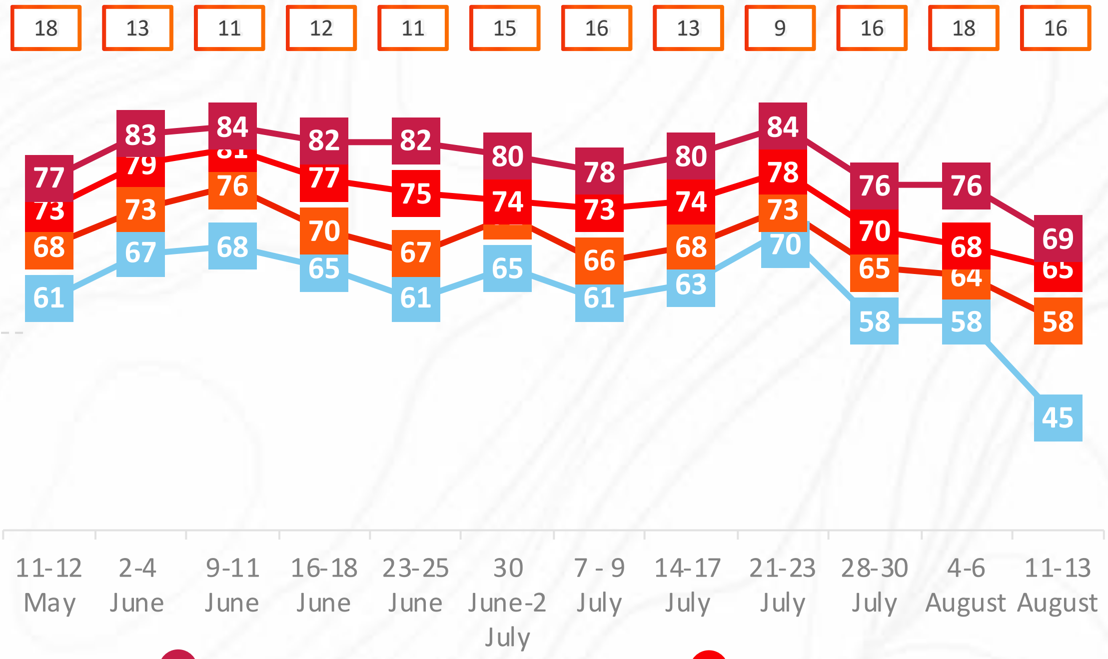
5.3

Average time **since** the activity last done

1.5

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

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?

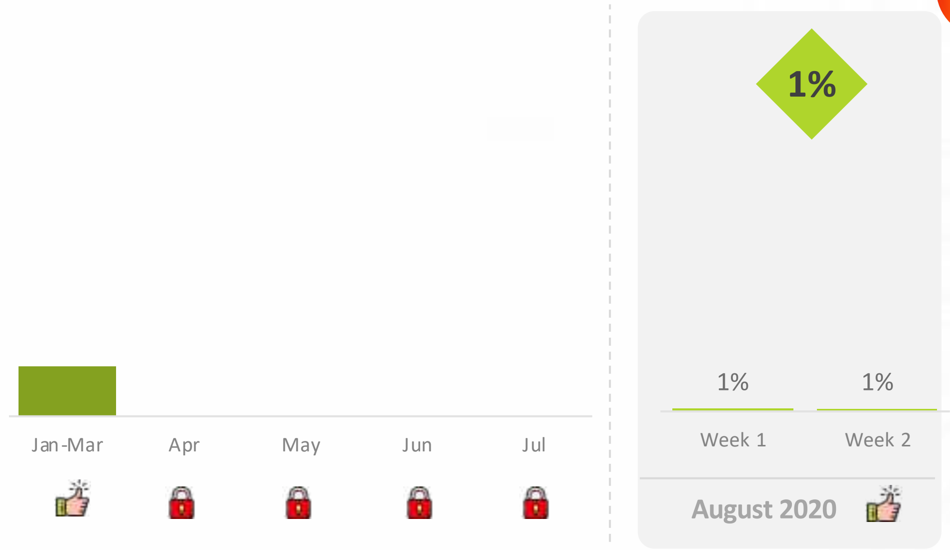
ALLIGATOR BVA BDRC

Market Recovery Tracking: Visit an indoor play centre

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

With indoor play centres permitted to re-open in England from the 15th August, intention to visit the attraction before the end of August, September and December sees a slight increase this week. However, the growth is tentative (and only a partial recovery on last week) as the public wait to see how measures are put in place and hear feedback on others’ experiences.

Visit indoor play centre since permitted



When the activity will next be done

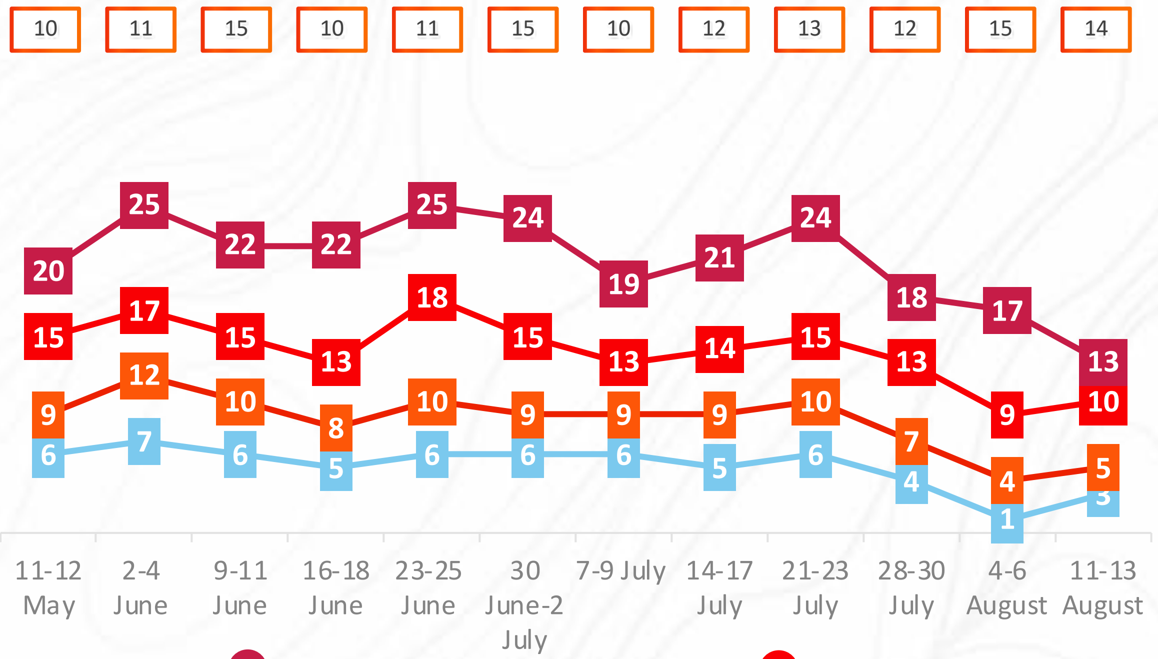
This week

8.4

Average time **since** the activity last done

4.6

Average time **before** doing activity



Planning on doing it but don’t know when

By end of April 2021 or later

By end of December 2020

By end of September 2020

By end of August 2020

NET participation since pandemic / activity permitted

Activity is not permitted

Activity is permitted

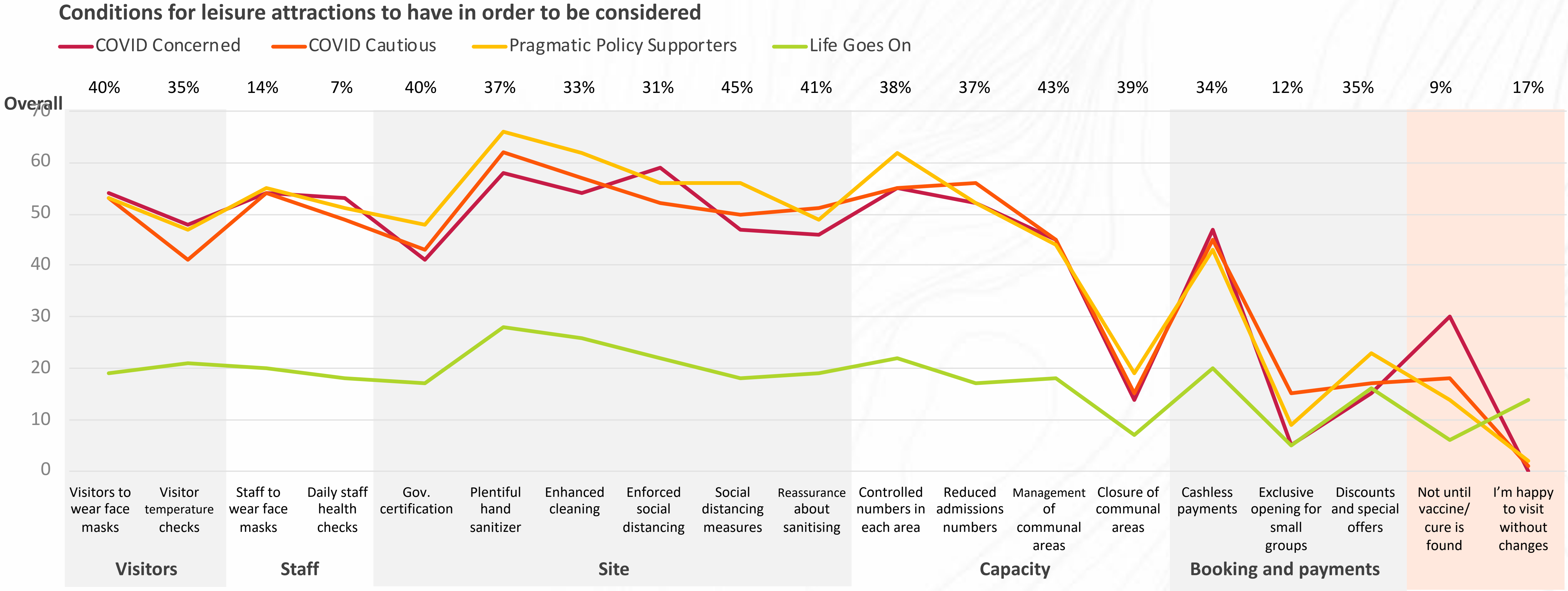
q12bnew. And when do you anticipate next doing the following? Base all
Q1a. And when exactly was the last time you did the following activity/activities?

ALLIGATOR

BVA BDRC

Attraction visitors are looking for the usual visitor experience, with sensible health and safety precautions. Hand sanitiser, enhanced cleaning and enforced social distancing enabled by capacity caps are essential for all segments except 'Life Goes On'.

Visitors typically do NOT expect discounted entry, or require exclusive opening for small groups, and closure of communal areas could actually be a deterrent – visitors want access to the full offer.



Q35. Which, if any, of these conditions would need to be met before you personally would consider going to a visitor attraction immediately after the lockdown has been lifted?

ALLIGATOR

BVA BDRC

How have the leading leisure charities been spoken about on social media during the crisis?

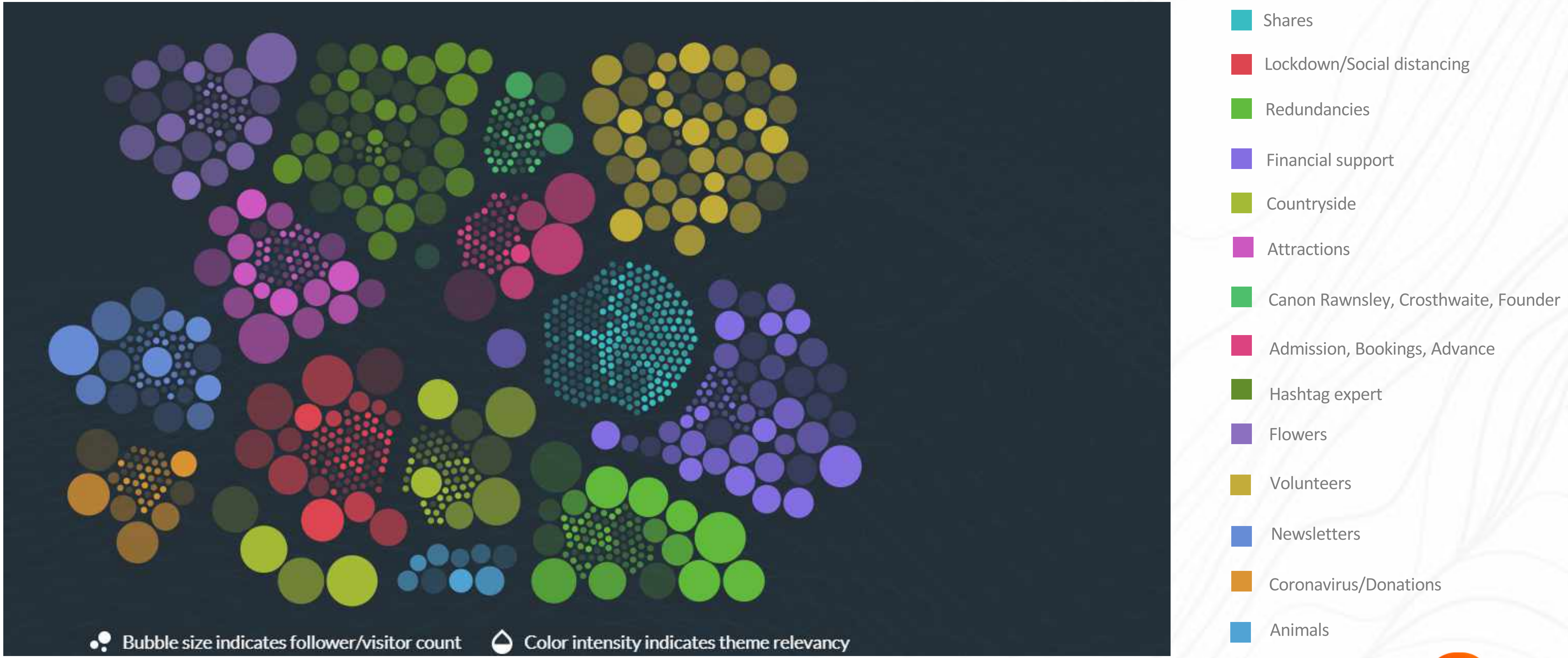
Overall, consumers engaging with social media have spoken about Kew, English Heritage and National Trust in positive terms during the crisis, with far more positive sentiment than negative.

23rd March 2020– 10th August 2020	Net Sentiment	Passion Intensity	Number of mentions
Royal Botanic Gardens Kew	86	60	48,049
English Heritage	60	82	35,008
National Trust	39	54	135,270

For social analytics methodology and full set of scores for all brands tracked, please refer to the Appendix

National Trust: key themes on social media

The greatest number of follower / visitor counts for the National Trust come from the themes of social distancing, financial support and around the redundancies that they have recently announced. National Trust is associated with its green outdoor spaces in the countryside, and during lockdown it was clear social media users were keen to continue this conversation. Needless to say, NT has been hard hit and has been calling for donations and financial support. News around redundancies inevitably impact sentiment.



Kew Gardens: key themes on social media

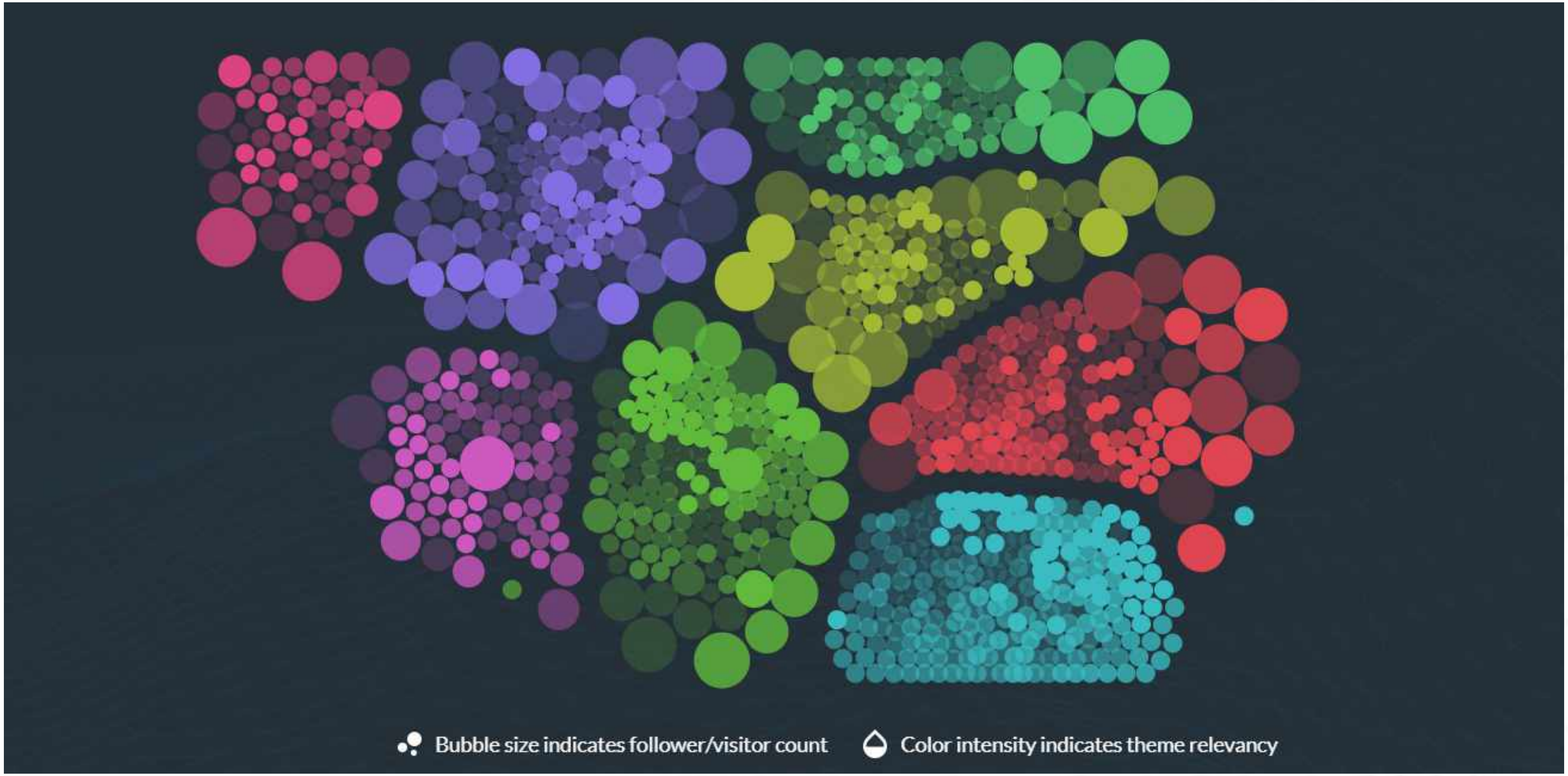
Flower photography dominates Kew's social media activity along with weddings and temporary platforms. The fact that social distancing is slightly smaller topic area reflects the fact that it is less of an issue and that on social media it is the Kew experience that people are speaking about.

- Plants
- Flower photography
- Ecosystems/biodiversity
- Research
- Wedding
- Social distancing
- Flowers
- Groups/Queens/Police
- Temporary platforms
- Stradivarious
- US
- Circulation

ALLIGATOR BVA BDRC

English Heritage: key themes on social media

National cultural institutions, mass gatherings / coronavirus and community events take up the largest part of English Heritage activity. The issue around mass gatherings / coronavirus suggests that there may be some contention on social media around this theme, so not all the posts are necessarily positive.



- Screenshots
- National Cultural institutions
- Summer Solstice
- Community events
- Mass Gatherings/Coronavirus
- Countries/Culture/British
- Plaques for women
- 18th Century/Victorians

How have leading attraction portfolios been spoken about on social media?

Hampton Court Palace has a very high level of passion intensity along with a very positive net sentiment, possibly linked to hosting an open air cinema during the August heatwave.

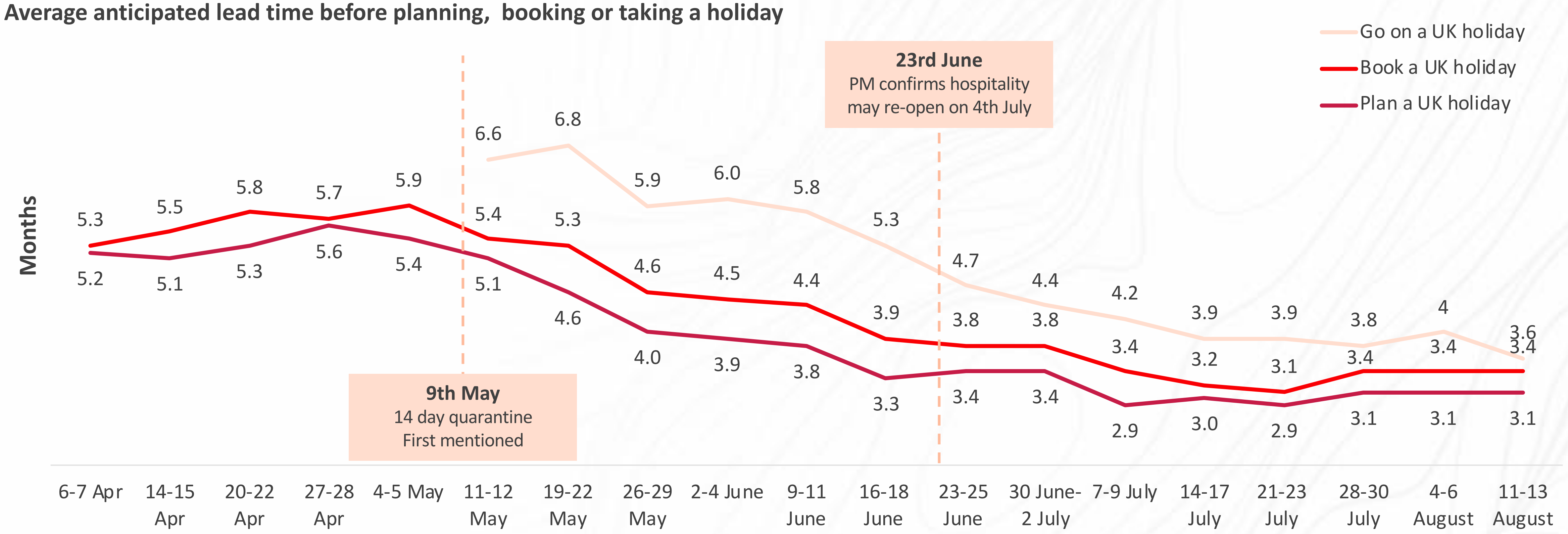
23rd March 2020– 10th August 2020	Net Sentiment		Passion Intensity	Number of mentions
Hampton Court Palace	98	HRP* 70	100	21,766
Kensington Palace	56		54	201,303
Tower of London	55		75	63,951
SEA LIFE London	84	Merlin* 35	100	724
LEGOLAND WINDSOR	70		28	6,020
CHESSINGTON WORLD OF ADVENTURES RESORT	-48		48	14,044

*An aggregate NET sentiment based on the brands presented on this slide

For social analytics methodology and full set of scores for all brands tracked, please refer to the Appendix

ALLIGATOR Bva BDRC

The lead time for planning and booking UK holidays continues to plateau this week, driven by some people having now taken their summer trip.

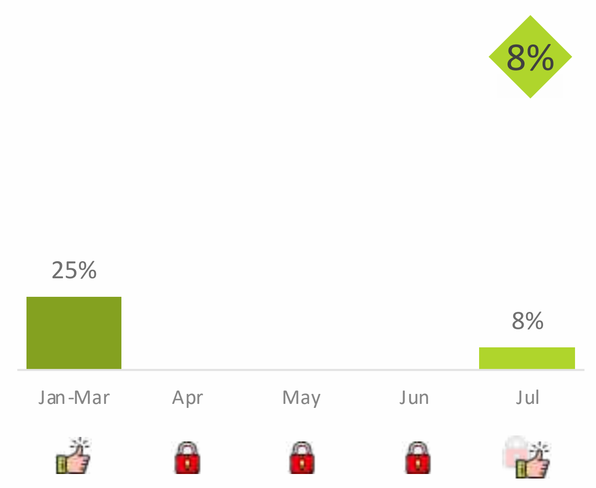


Market Recovery Tracking: Go on a UK holiday

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

The remaining weeks of August see intentions to go on a UK holiday before the end of August and September continue to drop, due in large part to people having already taken their holiday. Intention to take a holiday before the end of December, however, increases from 45% to 48%, as those yet to take any breaks look to use up holiday allowance before the end of the year.

Proportion been on a UK holiday this year



This week

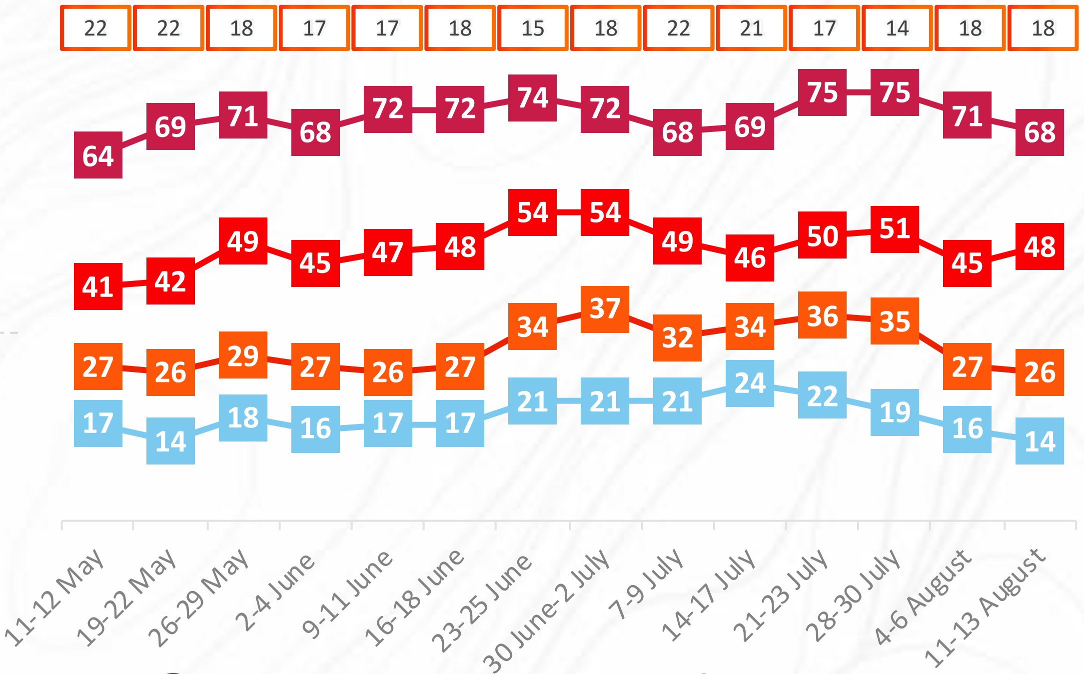
7.4

Average time **since** the activity last done

3.6

Average time **before** doing activity

When the activity will next be done



NET participation since pandemic / activity permitted

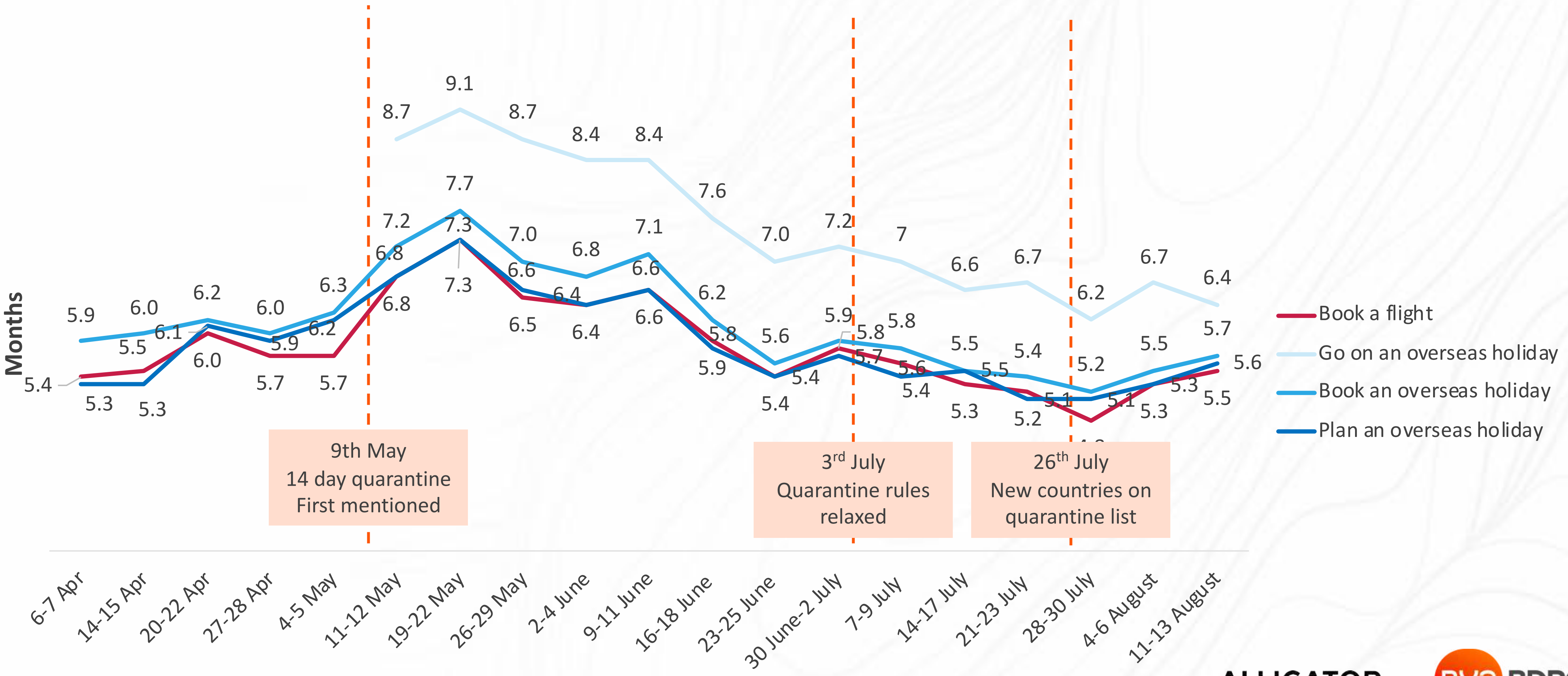
Activity is not permitted

Activity is permitted

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 continue to rise this week, possibly as a reaction to changes in quarantine rules.

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

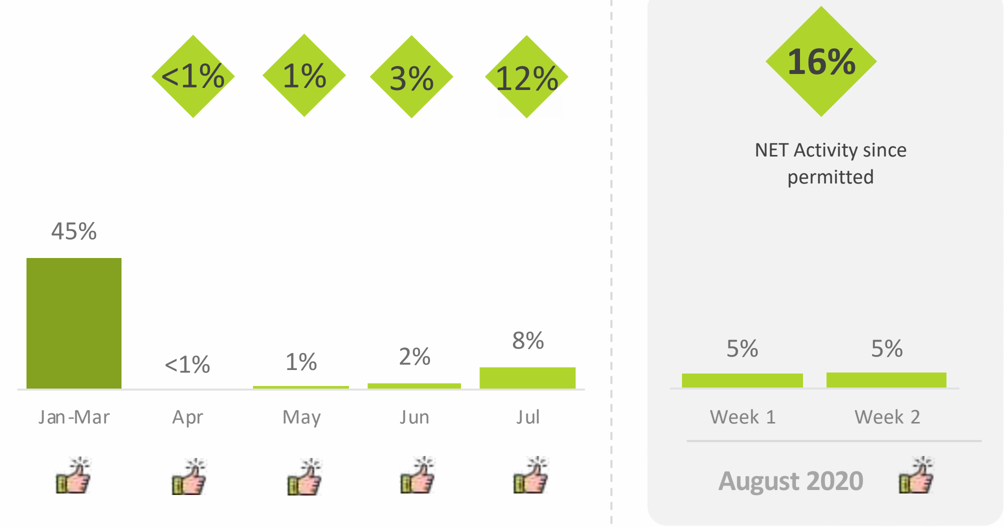


Market Recovery Tracking: Book hotel accommodation

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

As with domestic holidays, the forward outlook for hotel stays is weaker than in late July – reflecting the fact that some have now taken their trip / made their stay. There is, however, some recovery in intentions this week, after last week’s trough.

Book hotel accommodation since permitted



This week

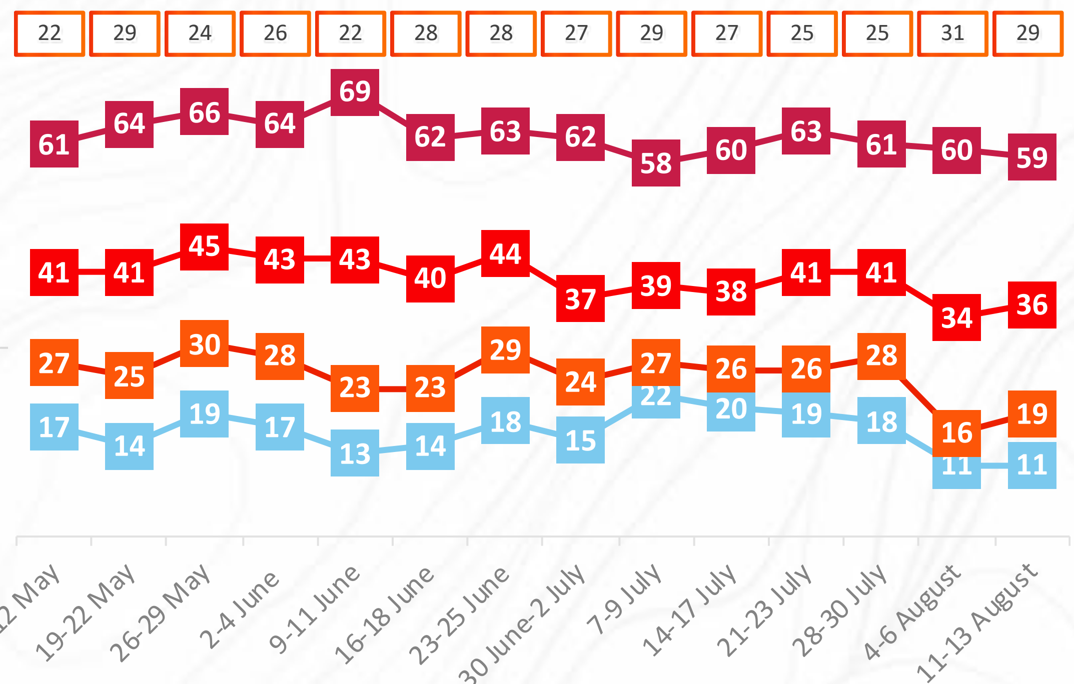
6.8

Average time **since** the activity last done

4.0

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

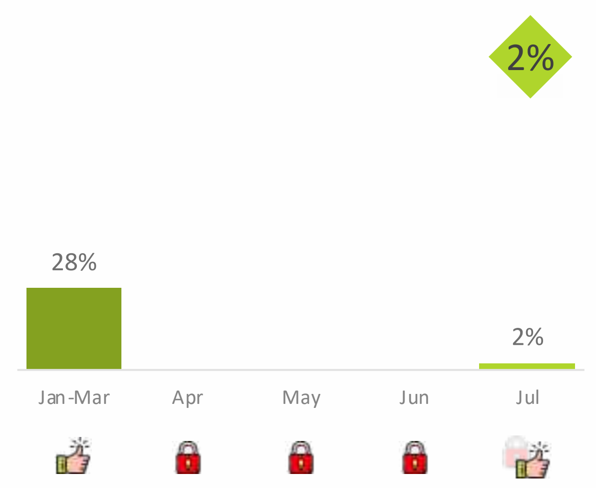
BVA BDRC

Market Recovery Tracking: Go on an overseas holiday

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

After last week’s record-low in overseas holiday intentions, there is partial recovery in the forward outlook this week – but the picture remains more negative than at any time through the summer months. The incidence of those who have taken an overseas summer holiday (among our ‘Travel Activist’ subset) is just 2% - compared to 28% who did so out of season in Q1.

Go on an overseas holiday since permitted



NET participation since pandemic / activity permitted

Activity is not permitted

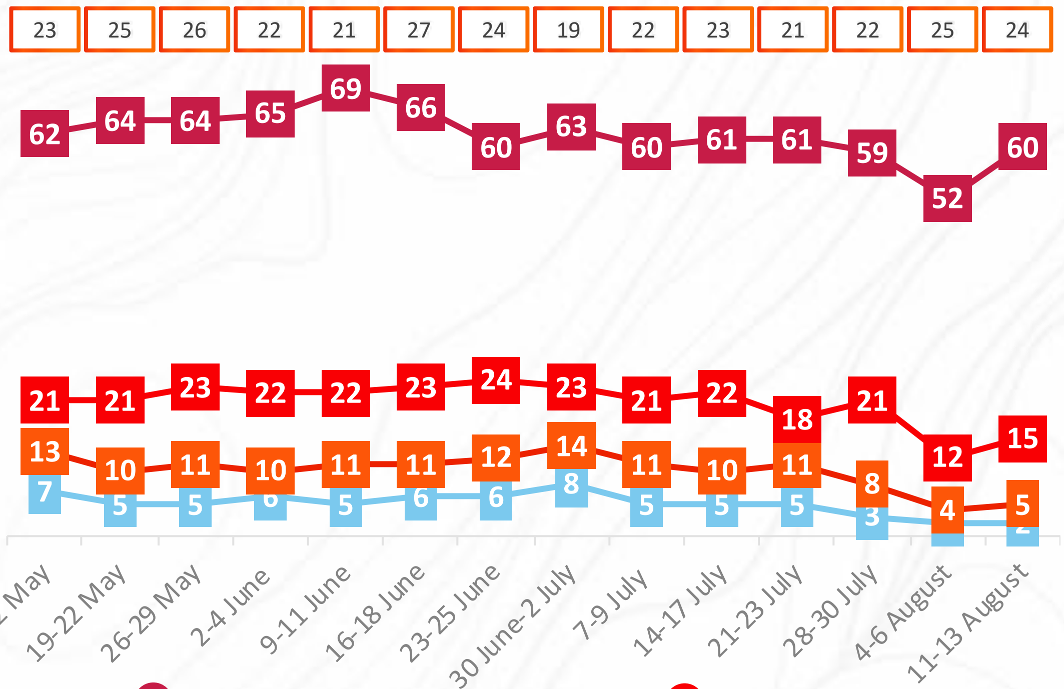
Activity is permitted

This week

8.3
Average time **since** the activity last done

6.4
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

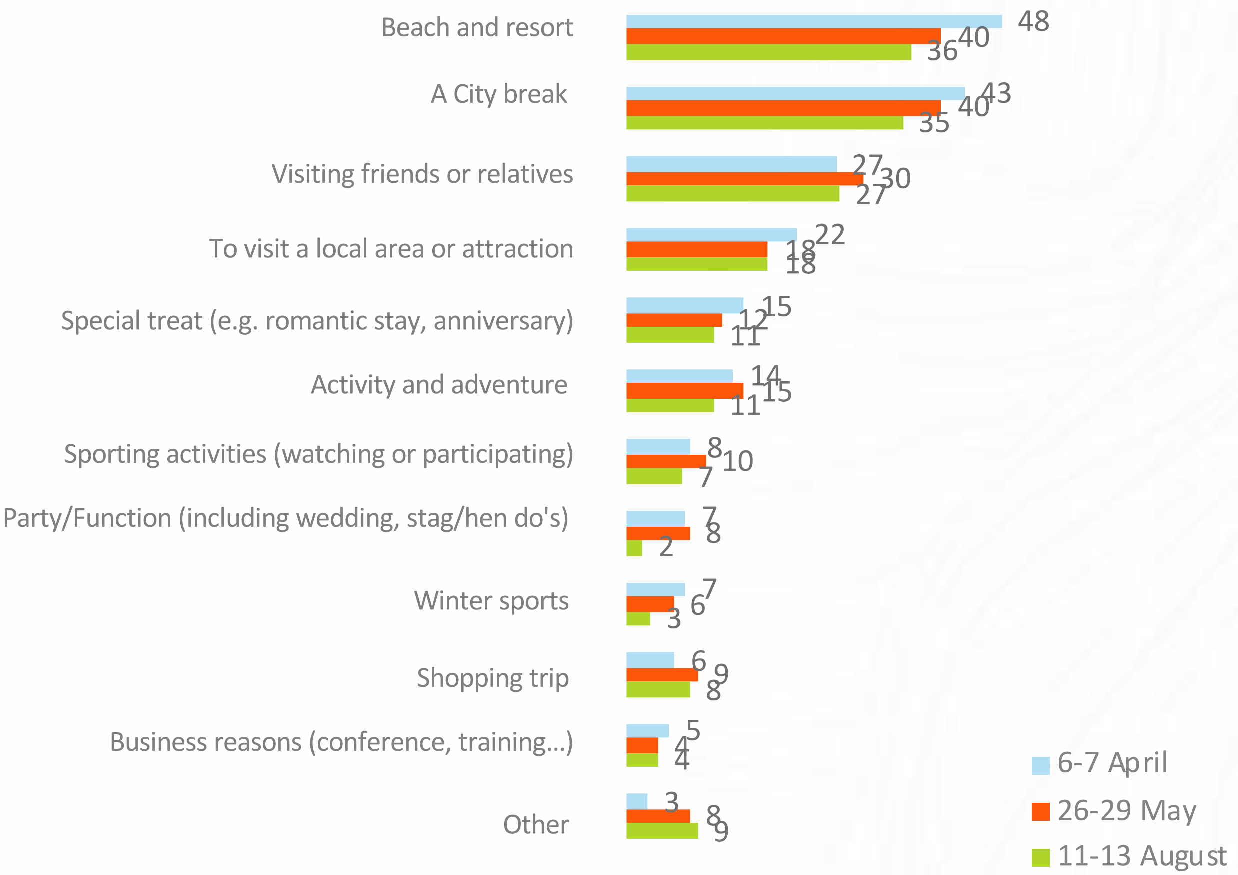
By end of August 2020

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

Among those contemplating an overseas holiday, ‘beach and resort’ remain the most appealing type of break, followed by ‘city break’. Spain remains the leading single destination mentioned, despite quarantine measures put in place.

Which of the following type of overseas holiday you are planning/going to book?



And where are you planning to go?

Top 5 mentions* (difference with end of May)

1. Spain (=)
2. USA (France)
3. France (USA)
4. Greece (=)
5. Italy (Netherlands)

Q27. Which of the following type of overseas holiday are you planning/going to book?
Q28: And where are you planning to go overseas?
* Last reported (week 10) if it differs in brackets

ALLIGATOR BVA BDRC

On social media: there is growing confusion and fear over quarantine rules when returning to the UK as 3 new countries are added to the quarantine list.

"If you choose to #holiday abroad, you have to recognise the risk of #lockdown on your return. It's a personal choice and a personal risk"

"It seems the fear of an imposition by the U.K. of an unscheduled quarantine on return is driving some to holiday in the U.K. rather than France"

"Replying to @TUIUK -
I don't understand this stand. The advice is that you have to **quarantine** on arrival back in the **UK**. Your promise is to not take people to places they will need to **quarantine**. Our villa has been cancelled over there (we are flight only). What are you proposing we do?"

"I have family in Germany and was considering Hull to zeebrugge. If I drive from Germany, without stopping, to the ferry, through passport control, am I considered to have entered **Belgium** for the **uk quarantine** purposes?"

"France is "on the cliff-edge" of being removed from the **UK**'s travel corridor list, according to an industry figure, with a decision expected by the end of the week that could mean hundreds of thousands of Britons holidaying there would have to **quarantine** on their return."

"France big reduction in positive tests (below **UK** yesterday). totally flawed logic to insist on blanket **quarantine** when coming back versus our own country. Why is the **UK** incapable of testing at our airports like others? Why aren't we looking at specific regions?"

"@TUIUK
Nothing is going to change, re **quarantine**. I just wanted to rebook to a different destination. Won't be doing that now as **Tui** have left it too late. Have arranged **UK** contingency plan now so will be asking for refund when the inevitable is announced."

How have key hotel brand portfolios been spoken about on social media? - Marriott

23rd March 2020– 10th August 2020

Brand	Net Sentiment	Passion Intensity	Number of mentions
MARRIOTT	32	54	167,541
COURTYARD BY MARRIOTT	86	68	22,450
JW MARRIOTT	79	67	10,483
AC HOTELS MARRIOTT	68	52	5,338

78*

*An aggregate NET sentiment based on the brands presented on this slide

For social analytics methodology and full set of scores for all brands tracked, please refer to the Appendix

How have key hotel brand portfolios been spoken about on social media? - Hilton

23rd March 2020– 10th August 2020

	Net Sentiment	Passion Intensity	Number of mentions
Hilton	41	72	169,746
Hilton Garden Inn	73	62	15,821
DoubleTree by Hilton	40	54	17,505
Hampton by Hilton	15	0	12,578

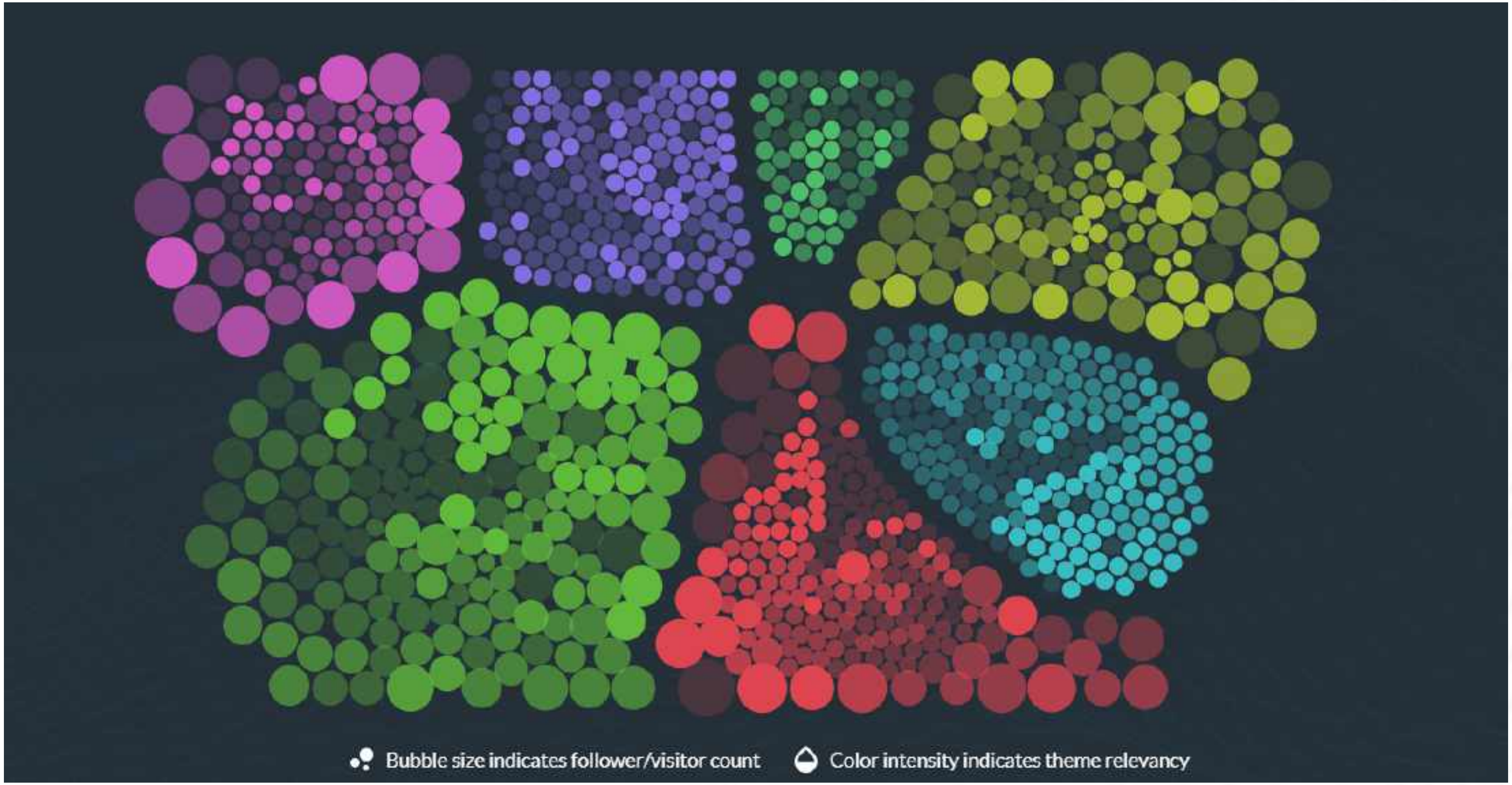
43*

*An aggregate NET sentiment based on the brands presented on this slide

For social analytics methodology and full set of scores for all brands tracked, please refer to the Appendix

Hilton: key themes on social media

Hilton launched its CleanStay programme as a means of optimising both safety and reassurance – and cleanliness accounts for a sizeable share of conversation around the brand. Less positively, Hilton's reputation has not escaped unscathed from its major redundancy programme; it has also been blighted by high profile discrimination law suits.



- Shares
- Cleanliness
- Lays off 2100 staff
- Citigroup research report
- Discrimination
- Golden globe awards association
- Discounts

How have key hotel brand portfolios been spoken about on social media? - IHG

23rd March 2020– 10th August 2020

	Net Sentiment	Passion Intensity	Number of mentions
IHG	59	62	72,523
CROWNE PLAZA HOTELS & RESORTS	82	73	16,613
Holiday Inn	54	66	92,601
INTERCONTINENTAL HOTELS & RESORTS	46	77	20,402
Holiday Inn Express	20	58	35,296

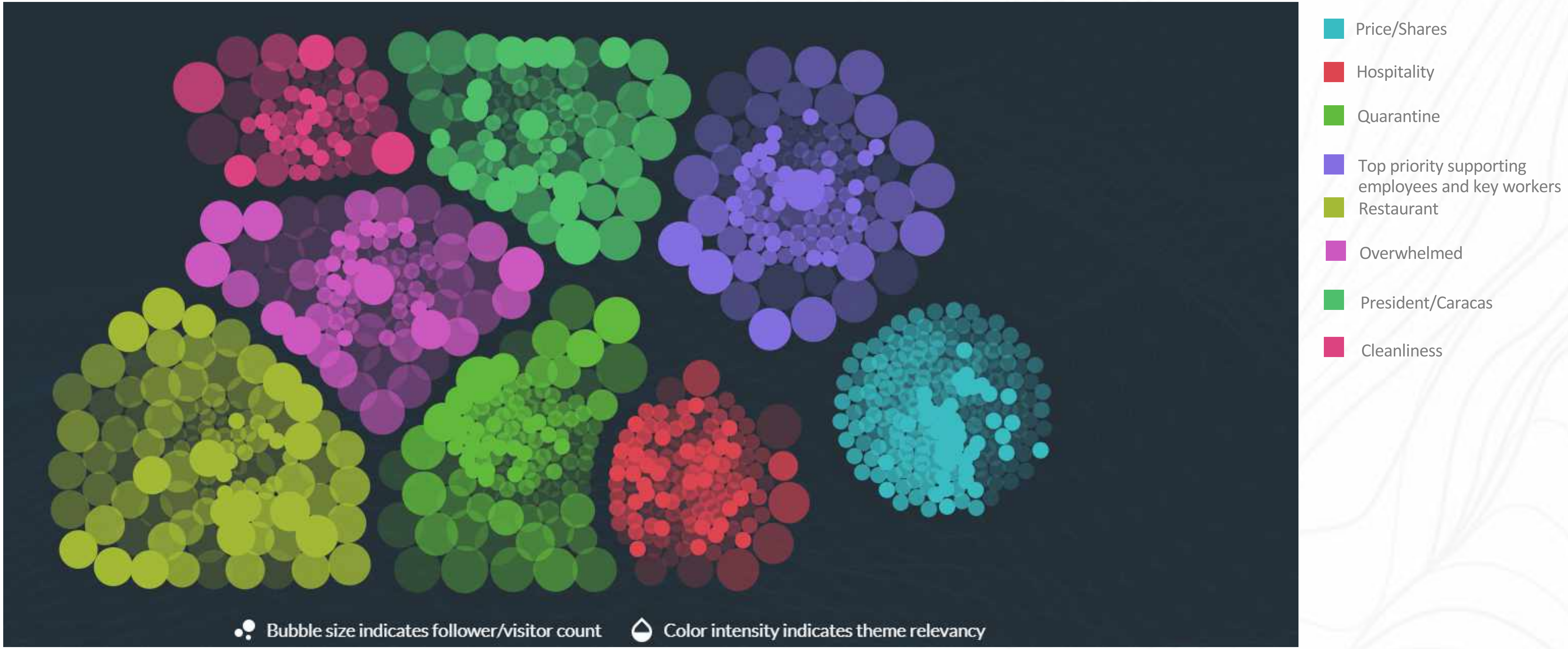
51*

*An aggregate NET sentiment based on the brands presented on this slide

For social analytics methodology and full set of scores for all brands tracked, please refer to the Appendix

IHG: key themes on social media

IHG's themes share many commonalities with other hotel businesses, with cleanliness and safety protocols featuring prominently. In both the UK and USA, it has benefited from a significant volume of conversations around its support for key workers through the crisis.



How have key hotel brand portfolios been spoken about on social media?

23rd March 2020 – 10th August 2020

	Net Sentiment		Passion Intensity	Number of mentions
Best Western Hotels & Resorts	60		55	18,465
Premier Inn	55		68	15,100
Travelodge	15		60	39,715
Novotel Hotels & Resorts	76	Accor* 69	64	20,470
Mercure	73		49	4,547
ibis	57		52	7,136

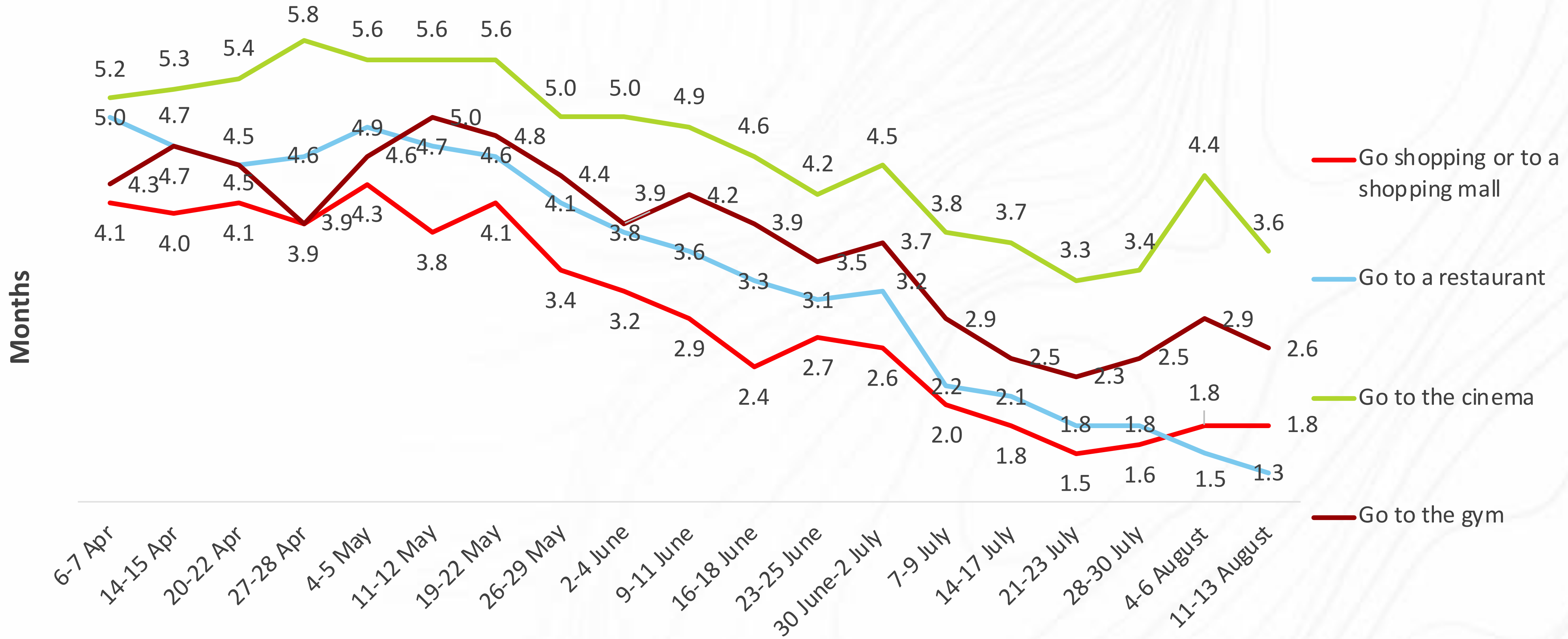
*An aggregate NET sentiment based on the brands presented on this slide

For social analytics methodology and full set of scores for all brands tracked, please refer to the Appendix

ALLIGATOR BVA BDRC

After last week's spike in anticipated lead-times to next shopping trip and cinema visit, there is a welcome return to shortening lead-times this week. The positive trend for restaurants continues.

Average time before undertaking leisure activities



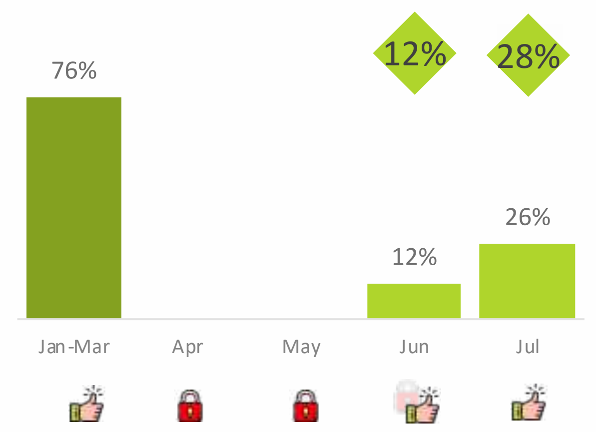
ALLIGATOR BVA BDRC

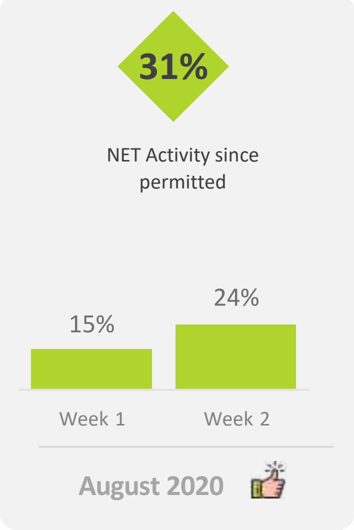
Market Recovery Tracking: Go on a shopping trip / to a shopping mall

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

For retail, the picture is mixed: on the one hand, actual levels of re-engagement continues to improve (nearly a third of Travel Activists have been on a shopping trip since the lifting of lockdown). Looking ahead, however, the incidence of those with planned shopping trips is continuing to decline – 1 in 5 this week intend to shop but have no idea when.

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





When the activity will next be done

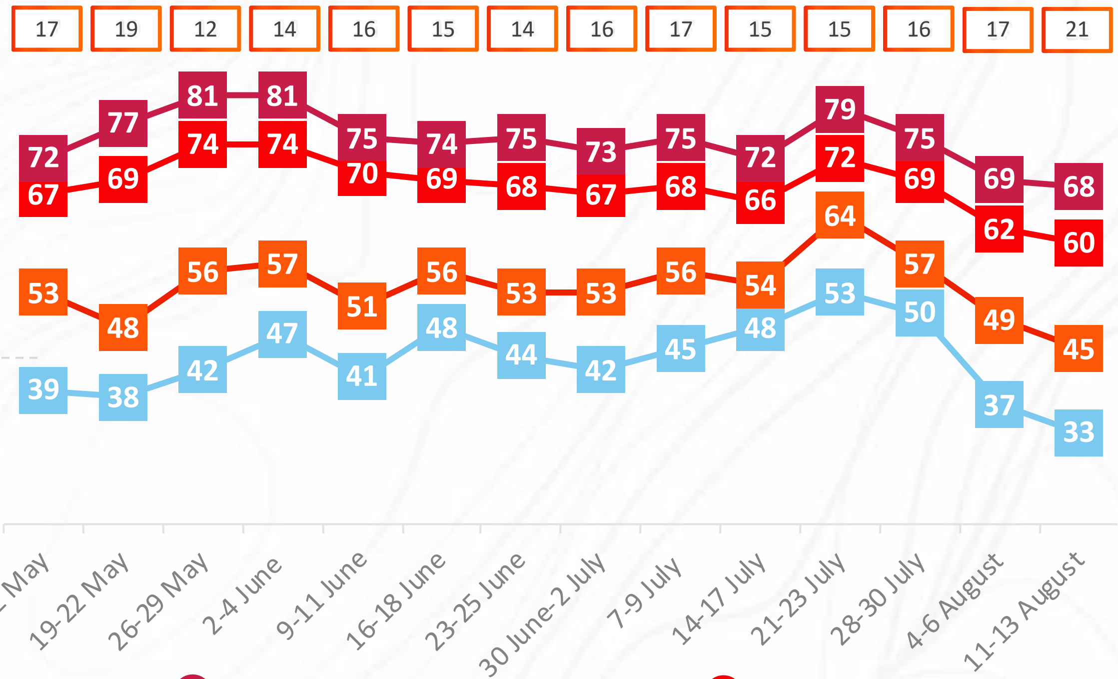
This week

4.3

Average time **since** the activity last done

1.8

Average time **before** doing activity



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

% 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 exactly when was the last time you did the following activity/activities?

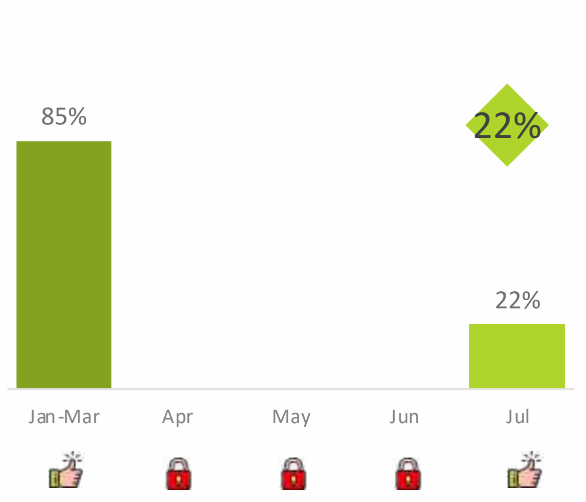
ALLIGATOR BVA BDRC

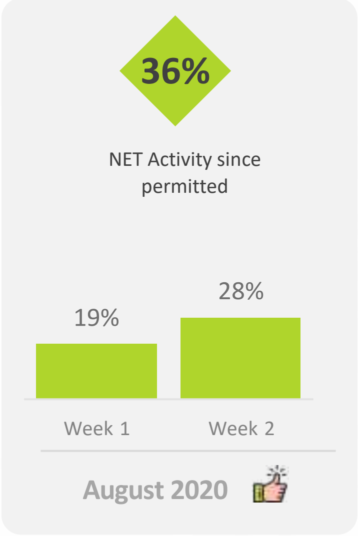
Market Recovery Tracking: Go to a restaurant

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

The picture for the restaurant market continues to improve. While the incidence of those dining out is still a fraction of pre-COVID levels, there is clear progress week-on-week, with forward intentions significantly stronger than for neighbouring sectors.

Gone to a restaurant since permitted





This week

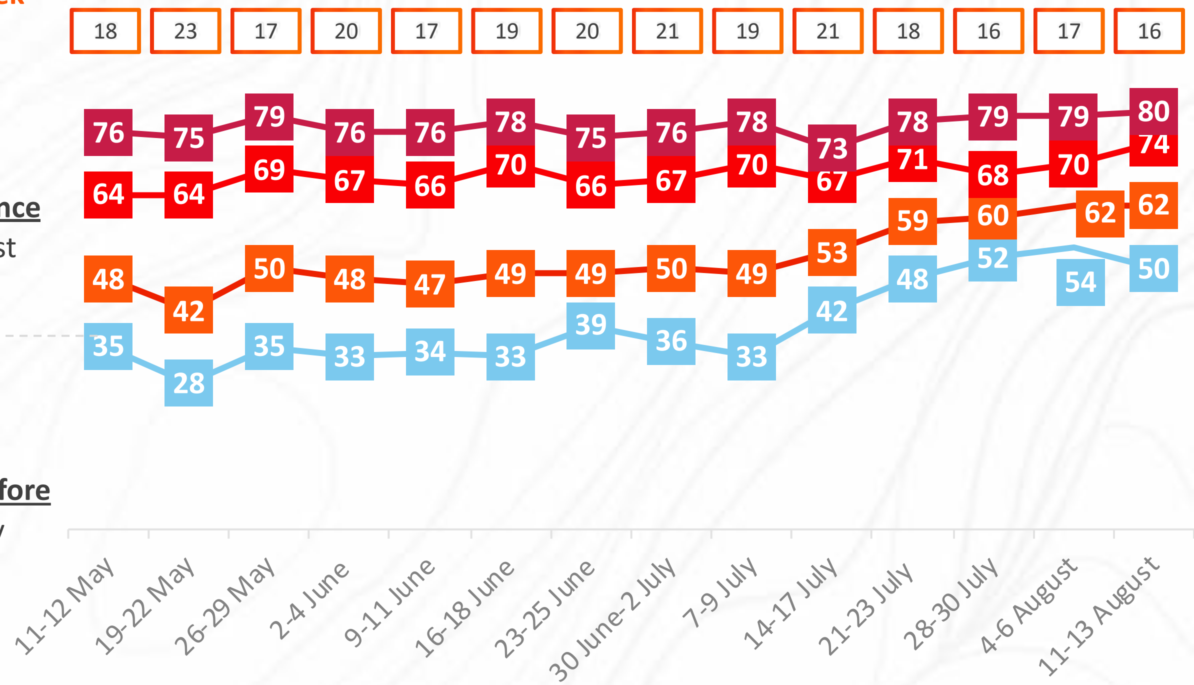
3.6

Average time **since** the activity last done

1.3

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

% NET participation since pandemic / activity permitted

Activity is not permitted

Activity is permitted

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

ALLIGATOR

BVA BDRC

On social media: the ‘Eat Out to Help Out’ scheme has had an overwhelmingly positive response. Many restaurants have had the nice ‘problem’ of lengthy queues and greater demand than capacity.

“10.5 million uses of **Eat Out to Help Out** in the first week alone! Considering that’s across only 3 days as well, it’s fair **to** say this policy has been a howling **success**!”

“All the “experts” couldn’t wait **to** say @RishiSunak **eat out to help** scheme was a white elephant - I’m pleased it’s been a run away **success** so far with many restaurants fully booked & trades up on this time last year.”

“Rishi's Dishes have been a great **success**! **Eat** your heart **out to help out**!”

“I mean how can I not take part in the **eat out to help out** scheme.”

“Yesterday was one more day eligible for "**Eat out to help out**". At my local **Nandos** past lunchtime queue was 3 hours waiting length.”

“The **eat out to help** has been a huge **success** , it’s amazing how a national advertising campaign can **help**. Well done Rishi a great idea and perhaps the light at the end of the tunnel.Morangie Hotel Tain Highlands.”

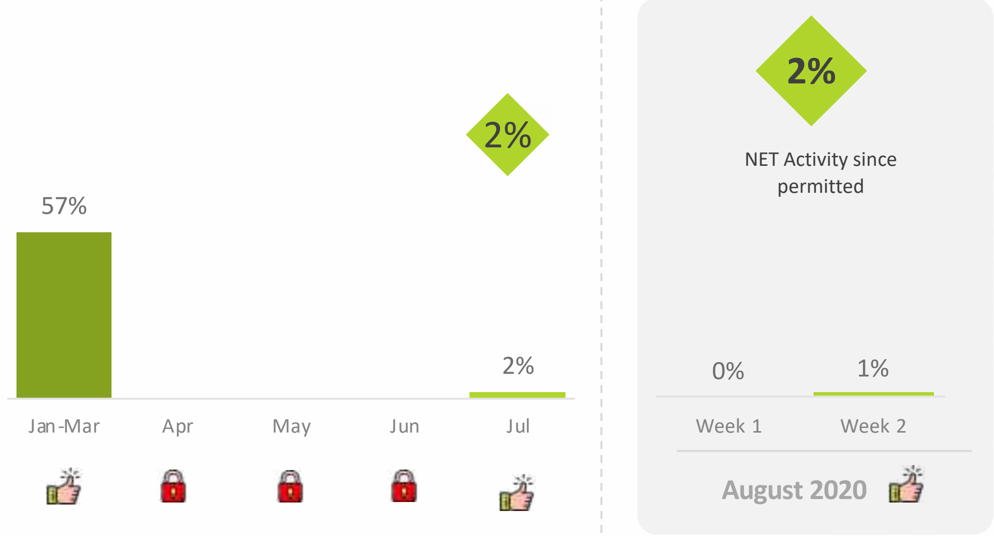
“I fully understand the underlying concerns but, have **to** say the **eat out to help out** scheme has been a rip roaring **success** in Chester, you literally can't get in many restaurants without booking.”

Market Recovery Tracking: Go to the cinema

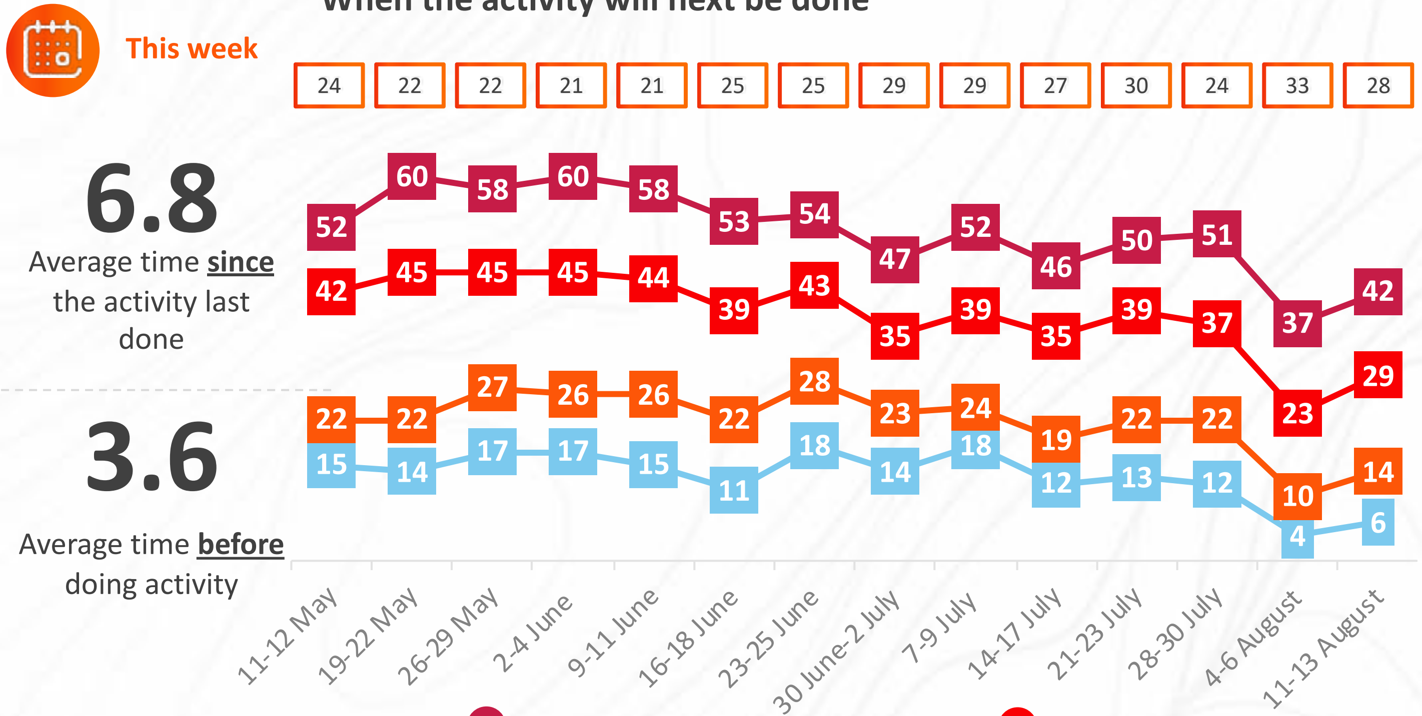
To what extent is consumer participation in each activity sector recovering to ‘normal’ levels?

After last week’s sharp decline, forward intentions for cinema visits recover somewhat. With a number of films such as Mulan due to have been released earlier in the year having gone straight to streaming services, many films scheduled for release from mid September onwards (such as King's Man and Dune) have kept their original release dates in the hope that once re-opened cinema attendance may pick up.

Gone to the cinema 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

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: despite some enthusiasm to return to cinemas, there is still concern of the consequences, many fearing a second wave. Once cinemas re-open and reviews start coming in, the hope is that this may encourage others to follow.

"I mean I'm perfectly comfortable going to the **cinema** as the **UK** is pretty much out of lockdown But like Most of the world isn't?? It just seems like poor timing for most?"

"In the **UK** we will have to wear face coverings in the **cinema** as well as socially distance. While it is for health and safety reasons, these measures will impede on the **cinema** experience that I so love"

"I'd imagine you can try to eat popcorn with your mask on although you'll find popcorn all over the floor which then requires more unnecessary extra cleaning"

"Tbh even if cinemas are open, I live with someone who was high risk, there's no way I would feel comfortable going to a **cinema** until I've gone back to uni, moved out, and no longer live with my Mum whose vulnerable. **Uk** is gearing up for round 2 we're no South Korea BH."

"In the UK they basically are. I know cineworld opened. It would depend on where you live. We've already been through the worst of it basically everything is open and it's easy to social distance in a cinema since there are designated seats."

"August 26th apparently. Too soon for the **UK**. However much I desperately want to see this wouldn't feel safe in a **cinema** yet."

"Idk if I should go or not. usually my **cinema** is empty anyway so it wouldn't be that big of a risk but idk if iI want to put myself in that situation especially since the **uk** are expected to have another spike"

"Big hit, the US has 4 million cases and is getting more by the second, the **UK** is planning to close down other stores for school to start. So many countries are struggling with the pandemic, we can't risk going into a **cinema**"

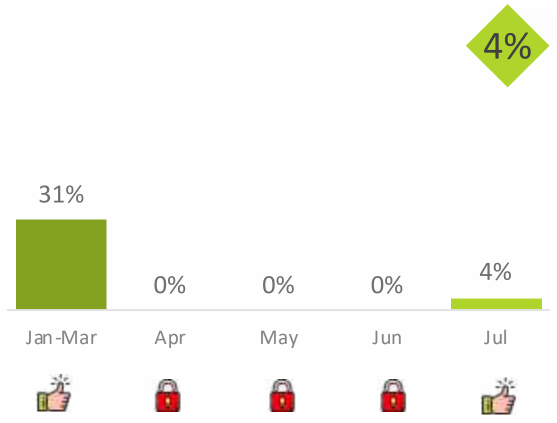
"You do realise that the **UK** Government has decided in its infinite wisdom to make wearing a face covering in the **cinema** compulsory from tomorrow?? I'd delay that film guys as nobody in their right mind will go to the **cinema** for the foreseeable future"

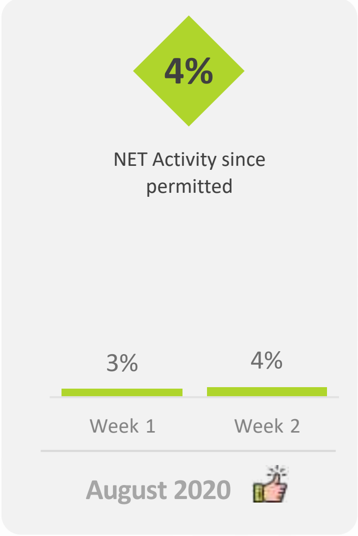
Market Recovery Tracking: Go to the gym

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

Like many of the other indoor facility businesses, gyms are sensitive to spikes in concerns about infection rates and the possibility of a second wave. The incidence of those going to the gym remains a small fraction of ‘normal’ levels. The forward outlook currently suggests that participation will still not have recovered fully by Q2 2021.

Gone to the gym since permitted





This week

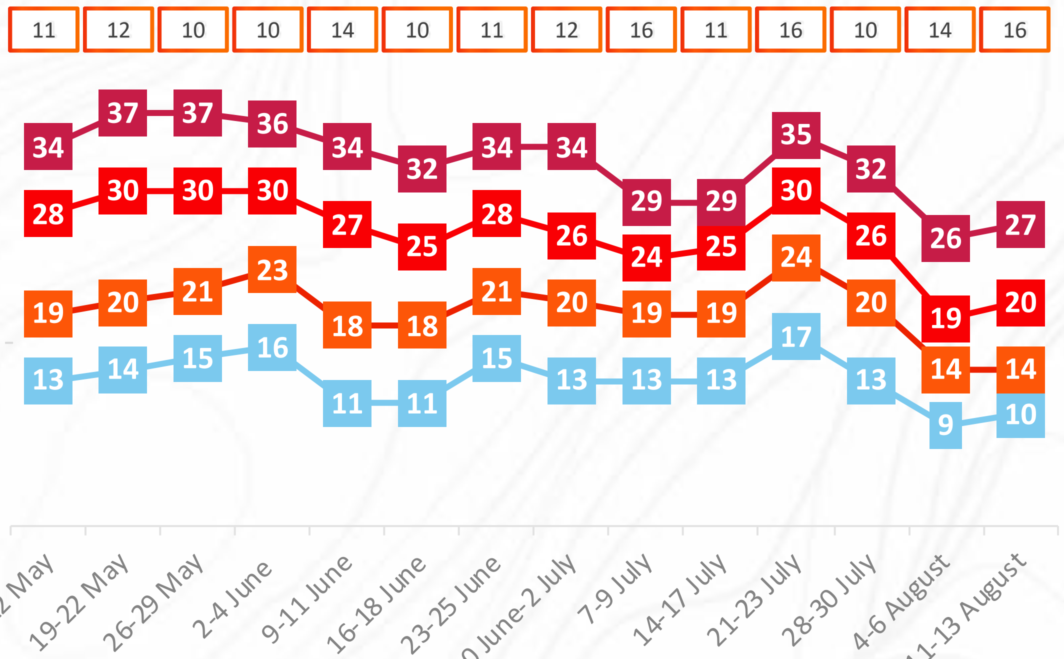
6.0

Average time **since** the activity last done

2.6

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

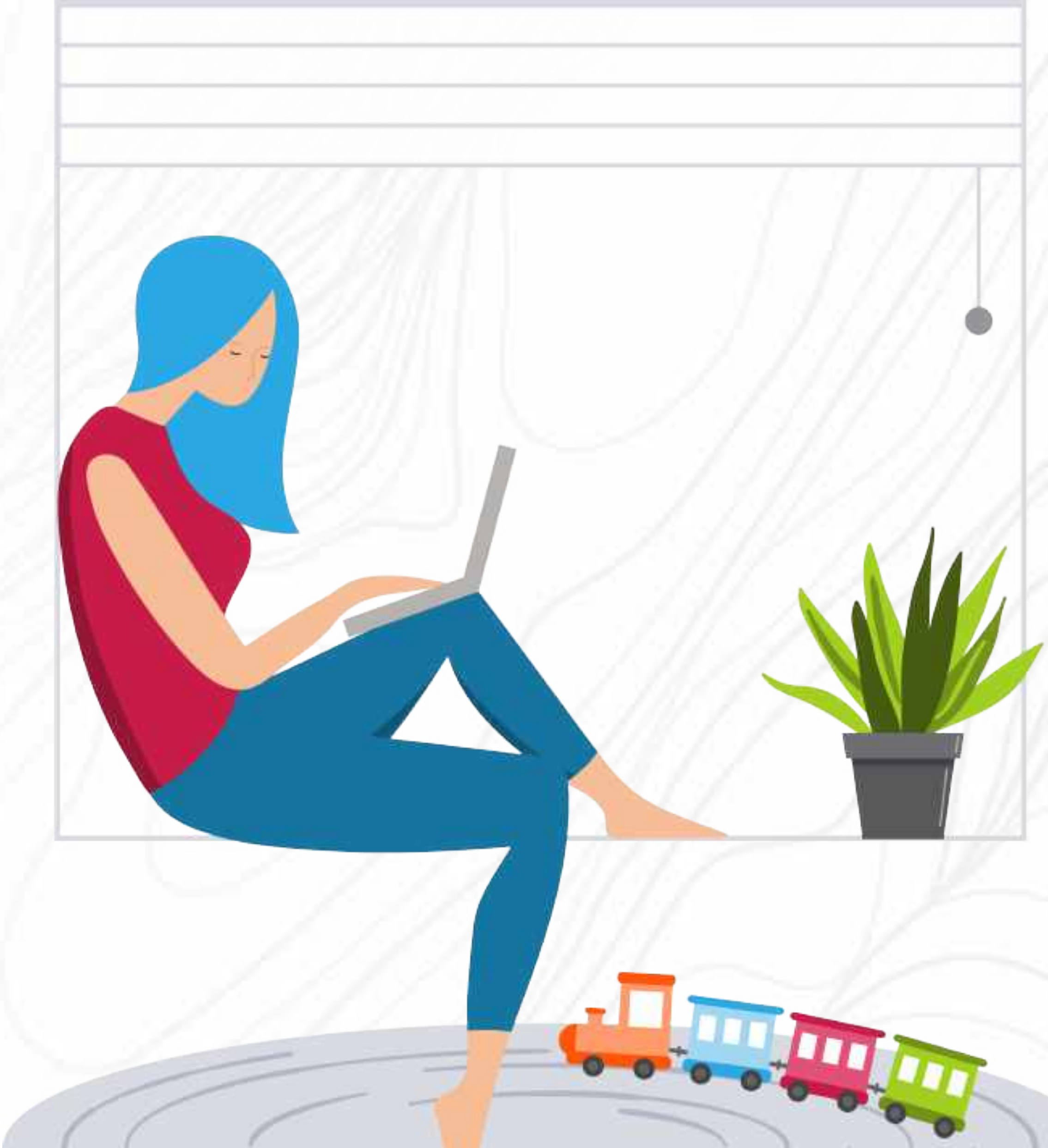
Activity is permitted

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

Transport

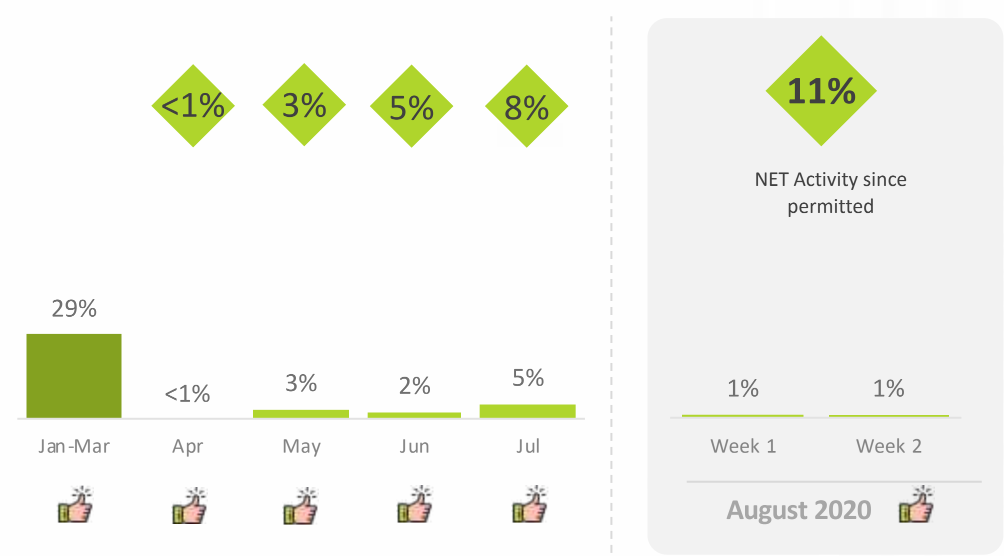


Market Recovery Tracking: Book a flight

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

Flight booking continues its fairly slow recovery with the overall incidence of those who have done so since April virtually unchanged from last week. Plans to book a flight are less optimistic than previously for the remainder of the year as airlines are looking to reduce their flight schedules for September and October and uncertainty grows about which countries might be added to the UK quarantine list.

Have done the activity since permitted



This week

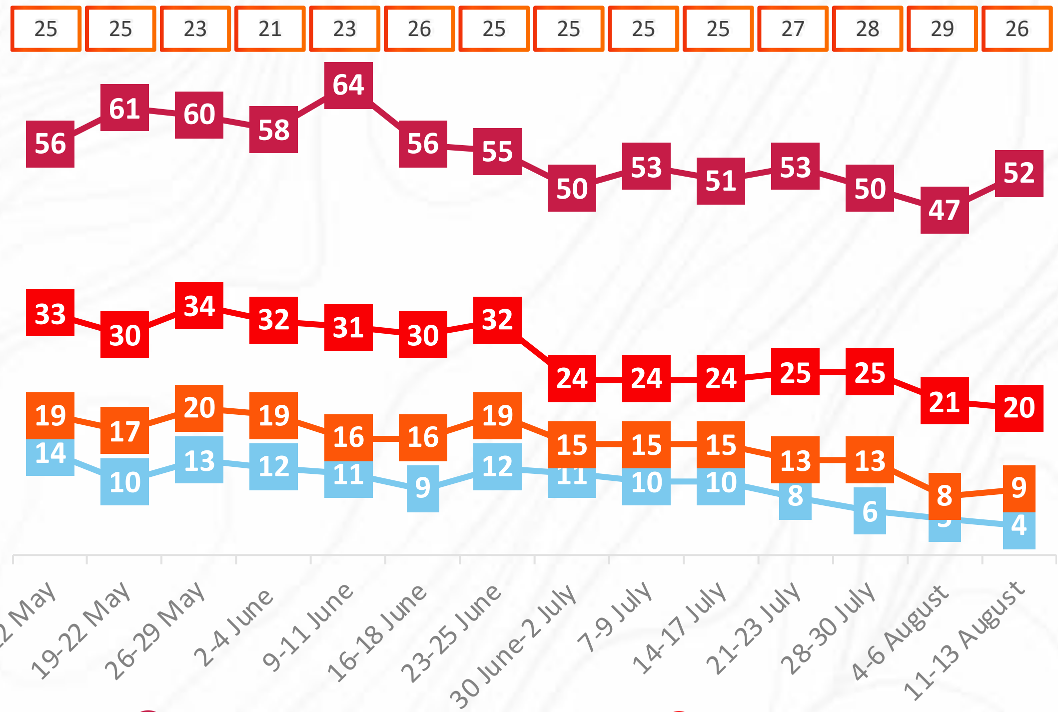
7.6

Average time **since** the activity last done

5.5

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 exactly when was the last time you did the following activity/activities?

ALLIGATOR

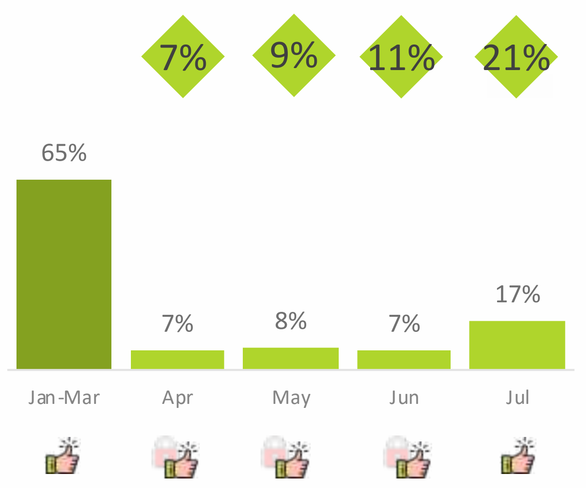
BVA BDRC

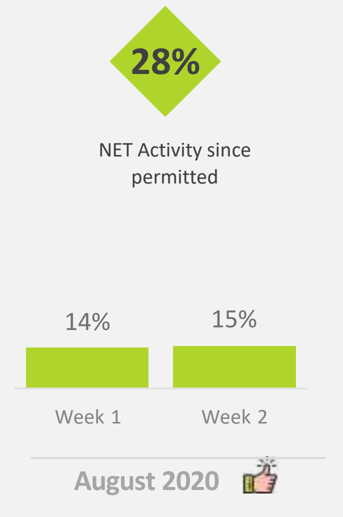
Market Recovery Tracking: Take the bus

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

Similar to flight bookers the overall incidence of bus users remains consistent compared to the previous week even though the share of those who have taken the bus this week is marginally higher. The challenge, it seems, is to convince those who used the bus before lockdown but have not done so again since that bus usage is safe again – of which the ‘COVID Concerned’ segment is a considerable proportion.

Have done the activity since permitted





NET participation since pandemic / activity permitted

Activity is not permitted

Activity is permitted

This week

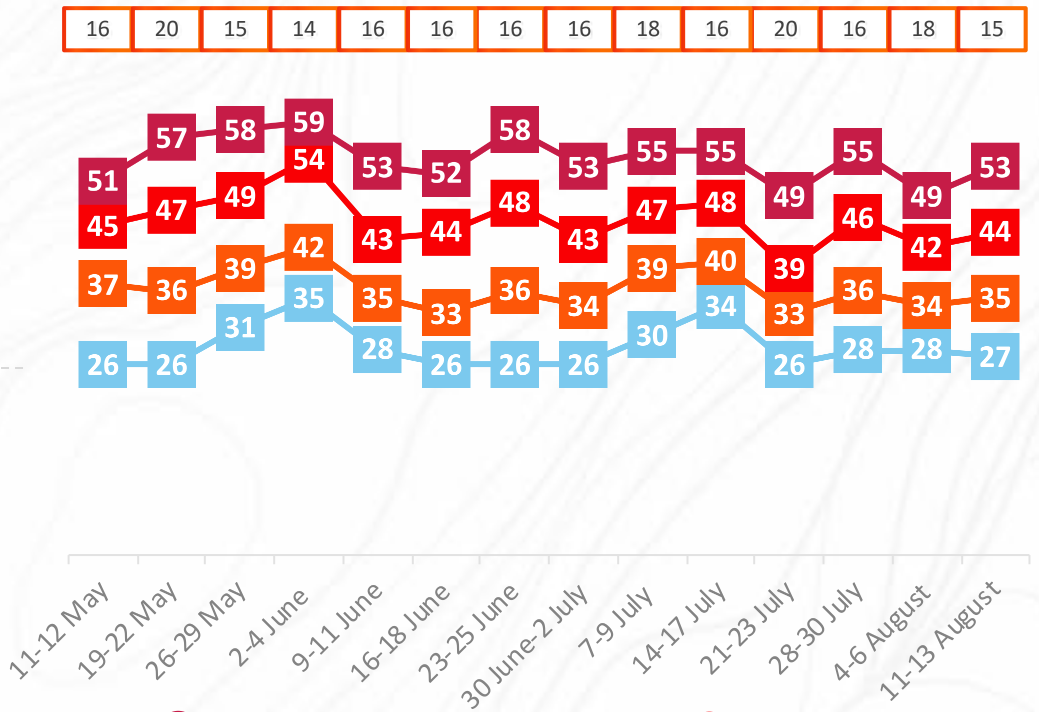
4.2

Average time **since** the activity last done

2.1

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

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?

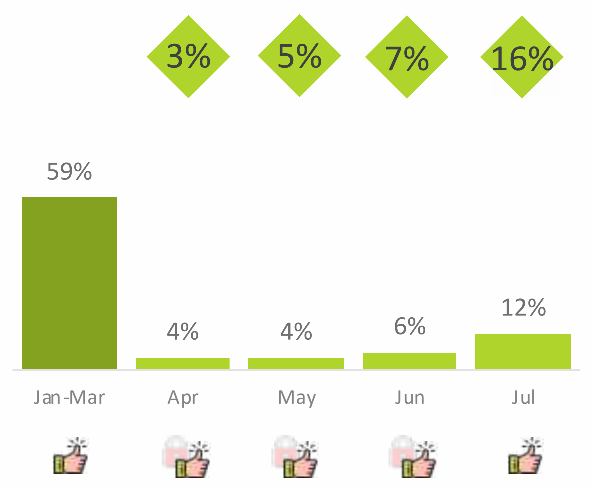
ALLIGATOR BVA BDRC

Market Recovery Tracking: Take the train

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

Growth in rail usage resumes again as more COVID Cautious Travel Activists take the train. Lead time to the next planned train journey, however, is unchanged from last week.

Have done the activity since permitted



This week

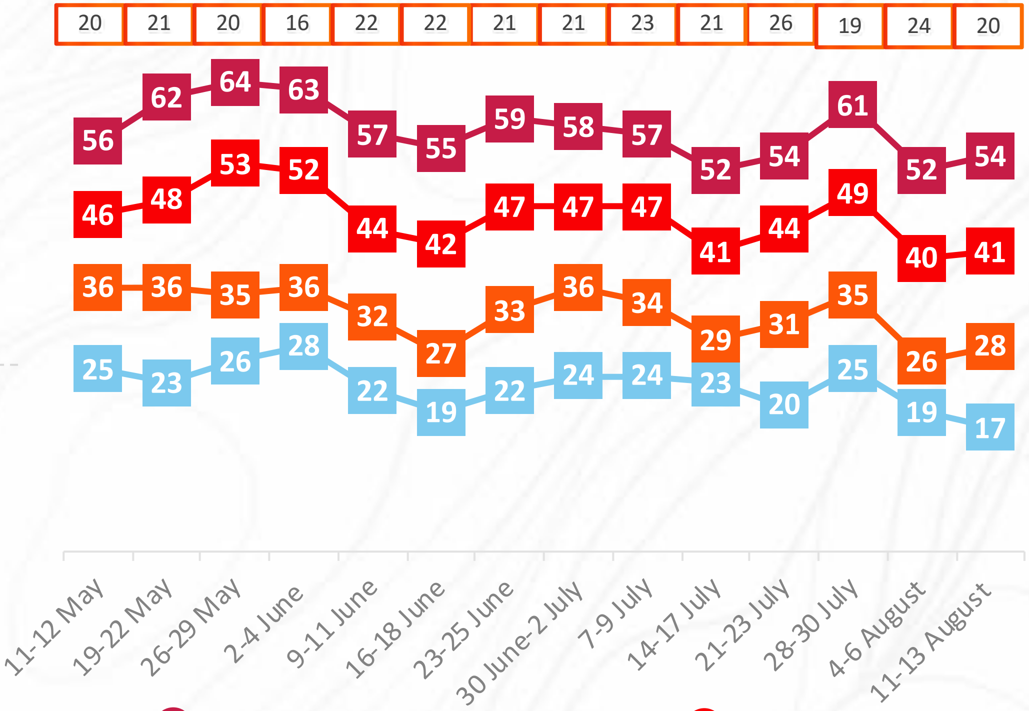
5.1

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

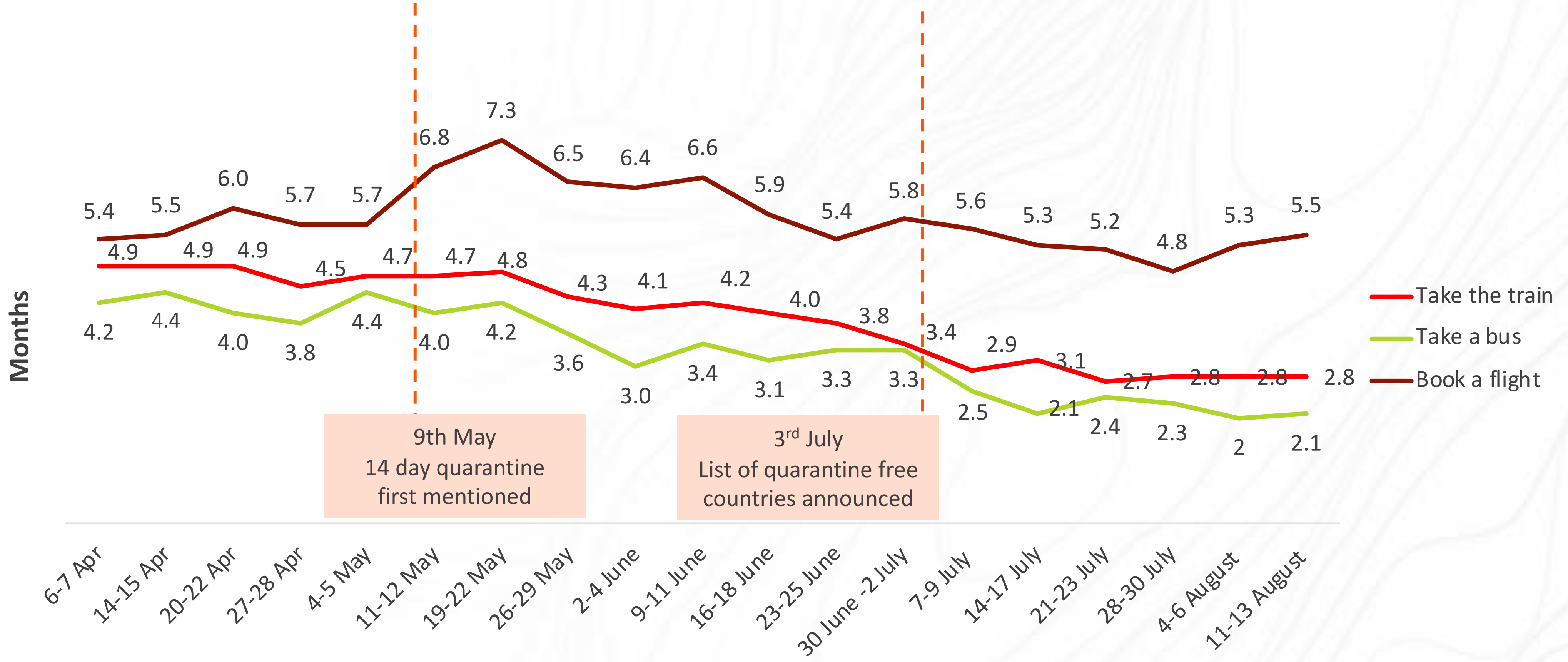
% NET participation since pandemic / activity permitted
Activity is not permitted
Activity is permitted

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?

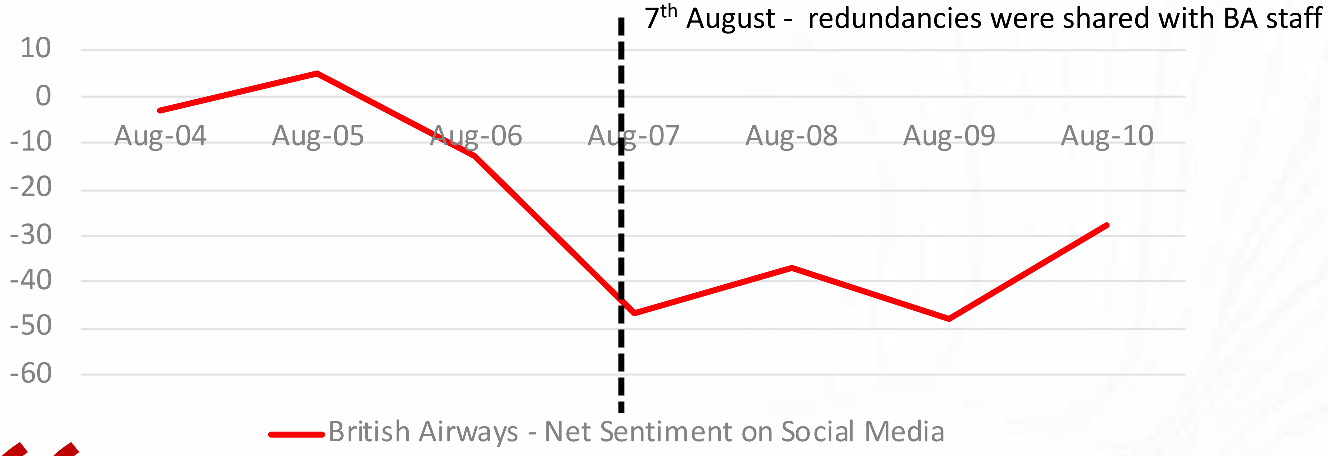
ALLIGATOR BVA BDRC

The headwinds for air travel show no sign of abating. Sluggish demand (linked to continued consumer fears about the virus / quarantine concerns) has been met by cuts in airline schedules. The result is another week of lengthening lead times.

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



Net Sentiment towards British Airways nose-dives as redundancy notices are made public



British Airways staff receive redundancy notices

More than 10,000 British Airways workers being made redundant

“ The way @British_Airways are treating the crew is disgusting. Time to #boycottbritishairways ”

“ So yesterday I got 'kept on' by @British_Airways Well actually, I got a notice of termination of my contract wrapped up as a job offer with a massive pay cut. But hey, why get bogged down with semantics. #BAbetrayal #NationalDisgrace #fireandrehire @BaBetrayal ”

“ British Airways employment pplicy stinks, I will never ever fly BA again. Disgusting!!!! ”

“ Well Willie Walsh you must be over the moon you’ve achieved a life long goal that is to destroy a once iconic British brand along livelihoods of thousands well done !the suffering you’ve caused hope you will never enjoy the blood money you’ve taken @British_Airways @BaBetrayal ”

“ Another Blackmail by British Airways towards its staff. “Sign before the 17th & we’ll give you staff travel”. Amy & Alex are putting again pressure and forcing staff to give up their existing contracts. Hang in there & do not sign anything! @BaBetrayal @BASSA_2000 ”

“ Are you aware @nytimes @British_Airways #WillieWalsh has made approx 10k+ staff and a union chairman redundant in one week. @BorisJohnson has ignored it for 16 weeks and is on holiday in Scotland. ”

“ Really sad for all the BA staff who just got shafted today. @British_Airways you are an absolute disgrace and don’t deserve their loyalty in the end #BAbetrayal ”

How have long haul airlines been spoken about on social media?

23rd March 2020– 10th August 2020

	Net Sentiment	Passion Intensity	Number of mentions
Emirates	45	100	400,558
Singapore Airlines	28	74	77,980
Etihad Airways	18	87	138,751
Qantas	6	49	149,002
Virgin Atlantic	6	36	294,090
Cathay Pacific	3	90	27,992
British Airways	-15	42	865,297

For social analytics methodology and full set of scores for all brands tracked, please refer to the Appendix

ALLIGATOR BVA BDRC

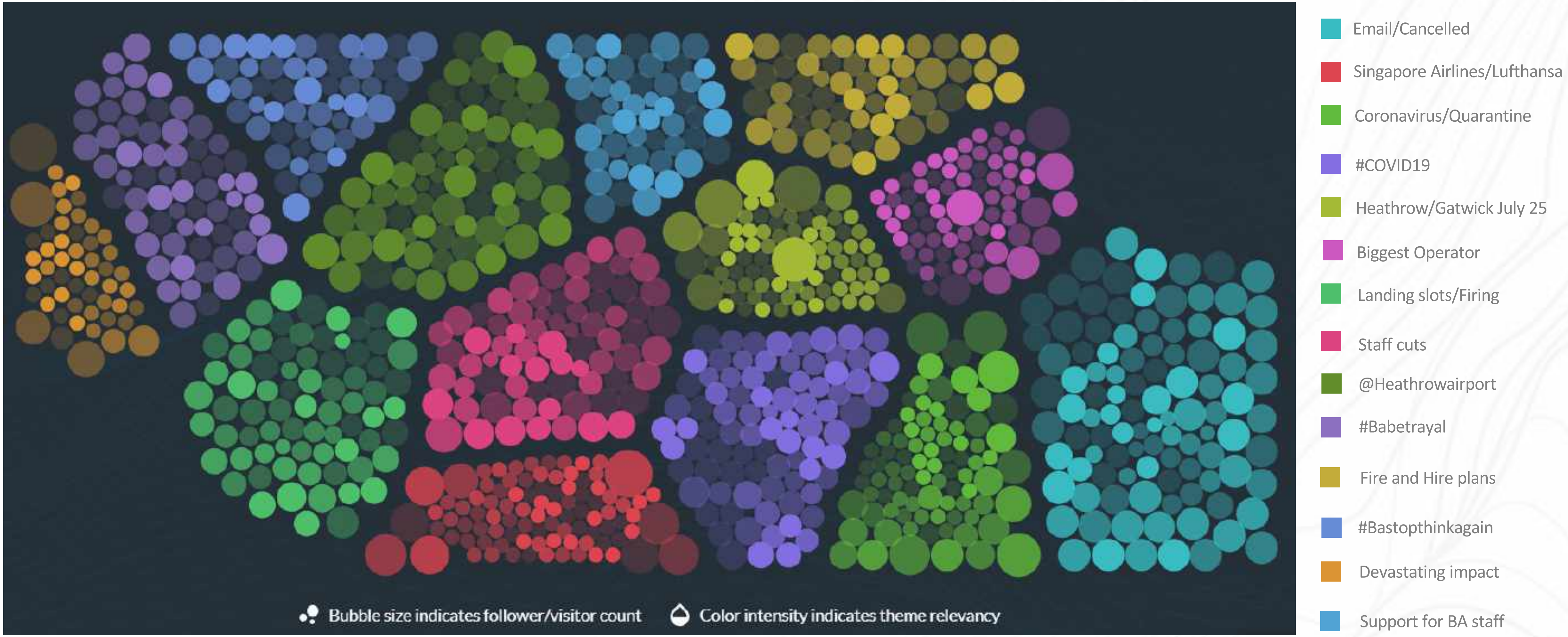
Virgin Atlantic: key themes on social media

For Virgin Atlantic, themes relate to advice on travel, refunds and the potential restart of flights this summer and later in 2021. As for many airlines, there is significant conversation around VA's financial challenges, a rescue plan (UK) and filing for bankruptcy protection (US) .

ALLIGATOR BVA BDRC

British Airways: key themes on social media

British Airways dealt with similar issues relating to quarantining arrivals, cancellations and minimal flights during the lockdown. BA has made mass redundancies as it seeks to steady the ship – inevitably leading to negative word-of-mouth / keyboard – most notably the #BABetrayal movement.



How have budget airlines been spoken about on social media?

23rd March 2020– 10th August 2020

	Net Sentiment	Passion Intensity	Number of mentions
easyJet	-3	43	498,724
RYANAIR	-18	61	434,242

For social analytics methodology and full set of scores for all brands tracked, please refer to the Appendix

How have airports been spoken about on social media?

23rd March 2020– 10th August 2020

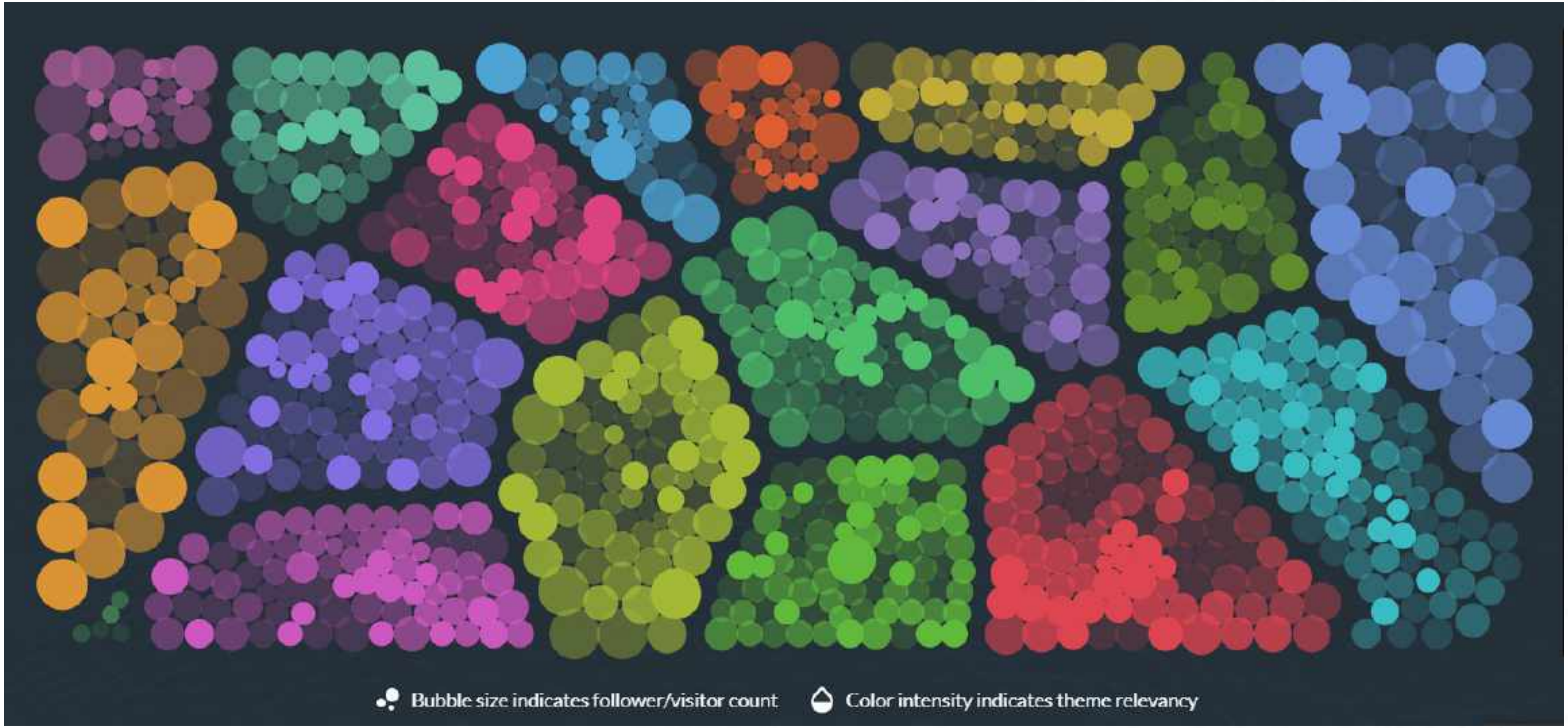
	Net Sentiment	Passion Intensity	Number of mentions
manchester airport	58	68	18,837
Gatwick	1	44	148,438
Heathrow	-13	88	1,432,545
London City Airport	-17	51	54,931

For social analytics methodology and full set of scores for all brands tracked, please refer to the Appendix

ALLIGATOR BVA BDRC

Heathrow: key themes

As an airport to many of the larger airlines, themes associated with Heathrow Airport relate to #BaBetrayal that was widely conversed online and within the media alongside major airports. Alongside this, the airport has dealt with refunds, cancelled flights, as well as ensuring safety through COVID safety measures as flights resumed.



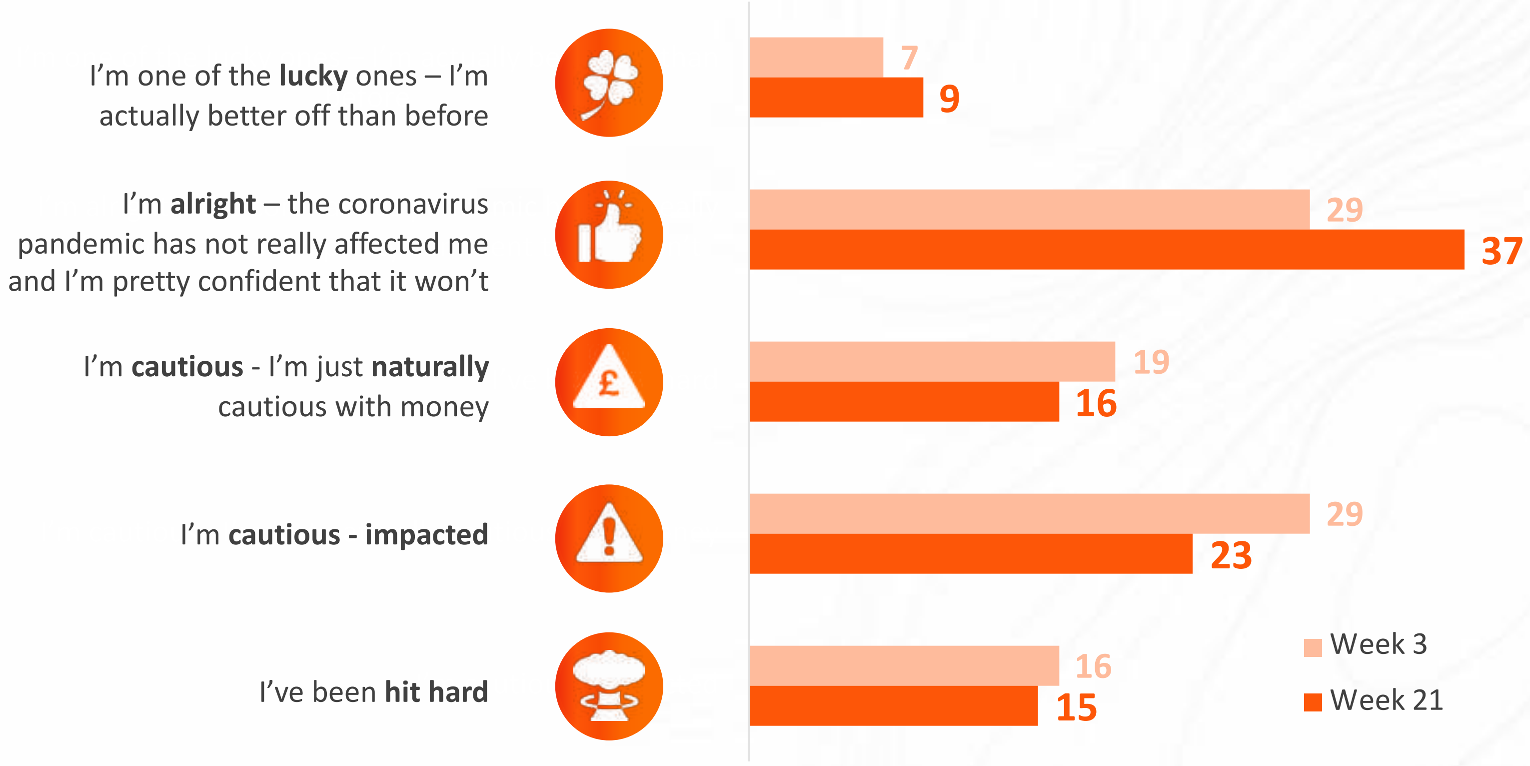
- Corporate greed - BA
- Aviation
- #Fireandrehire plan
- Social distancing
- Vouchers/Refunds
- #Handbacktheslots
- Cancelled flight
- Customer service
- China flights
- Passengers/Attendants
- Profits and return
- Contact details
- Support/board/care
- Coronavirus
- Temperatures

ALLIGATOR BVA BDRC

Personal and business finances

As the UK enters deep recession, consumers' financial circumstances are in fact better than at the start of lockdown and in comparison to the 2008/9 crisis. But for how long?

Personal feeling about own current situation - segments



2008/2009 Financial Crisis Average across 6 Waves of BVA BDRC's Project Mars

4%

23%

35%

20%

17%

Q17: If you had to choose, which ONE of the following statements would best describe your feelings about your own situation, right now?
Q18: Some people are just naturally cautious with money. Others have become cautious, because of their financial situation during the coronavirus pandemic. Which one of the following best describes you?

Meanwhile businesses are already grappling with survival measures

We consulted our Business Views community to understand the mood, emotions and anticipated actions in light of the news that the UK has entered the worst recession on record. While some are clearly more resilient than others it is anything but 'BAU' for the majority of businesses; even those feeling relatively upbeat at present are treading carefully, mindful of the challenging times ahead. Stringent cost controls will have a knock-on effect for service providers but there is likely to be an opportunity for any brands in a position to provide guidance and help businesses navigate turbulent circumstances or adapt their current business model.

Business response to news about the recession

Mood	**Bad** 6 of 35	**Neutral** 14 of 35	**Good** 15 of 35
Feelings	Anxious / concerned / pessimistic / guilty disconnected	Fed-up / tired / indifferent / apprehensive / vindicated	Wary / hopeful / determined / sympathetic to others
Actions	Redundancies Looking for new ventures	Cost + credit control / marketing + customer acquisition / striving to deliver value / closer management / better forecasting / innovation and diversification	

Source: BVA Business Views Community
In light the news about the recession, what score between 0 and 10 would you give for how you are feeling at the moment about your business? Which emotions are you feeling as a result of this news? What actions or activities might you take to try and minimise the overall impact of the recession on your business?

Comments from the Business Views community highlight the melting pot of emotions and determination to adapt wherever possible

What will my long term future look like? Do I need to think of completely new services and say goodbye to my favourite work? Emotions: sadness, but also some happy anticipation; possible excitement. Then I feel sort of worried too. In short, emotions are mixed an they go up and down.

[Management Consultancy, sole trader]

I have a loss of interest in today's world. I will just walk away.

[Non for profit organisation, 100-199 employees]

We are unable to do any events – we'll just prolong the recovery until common sense relaxes the rules. But we will make staff redundant.

[Hospitality, 3-5 employees]

I will almost certainly have to make some redundancies.   I need to start shopping around for another supplier in the hope of saving money and improving availability. Making protective screens for shops and reception areas has kept the business ticking over throughout the pandemic but for the most part it's been rush orders, minimal appropriate materials and manpower so I want to improve and increase the product line and target all our potential customers asap. I will also spend more time talking to other business owners to see if there are any ways we can help each other through this time.

[Manufacturing, 11-49 employees]

Not surprised as output has been low, I am concerned and worried about the future as I cannot see a plan from the Government and still don't know about BREXIT deals. We have expanded our sales department to expand the circle of customers around the world. We have tightened our Credit control to ensure we have a handle of our outstanding invoices. We are in the process of examining all the external services we use for price and need.

[Manufacturing, 100-199 employees]

Source: BVA Business Views Community
In light the news about the recession, what score between 0 and 10 would you give for how you are feeling at the moment about your business? Which emotions are you feeling as a result of this news? What actions or activities might you take to try and minimise the overall impact of the recession on your business?

How have banks been spoken about on social media?

The neobanks have consistently led the charge on social media, however Nationwide proves that it is possible to achieve similarly strong sentiment, on a par with Starling, yet with a very different proposition and business model. 'Big banks' Barclays and NatWest are some way behind in comparison.

23rd March 2020– 10th August 2020

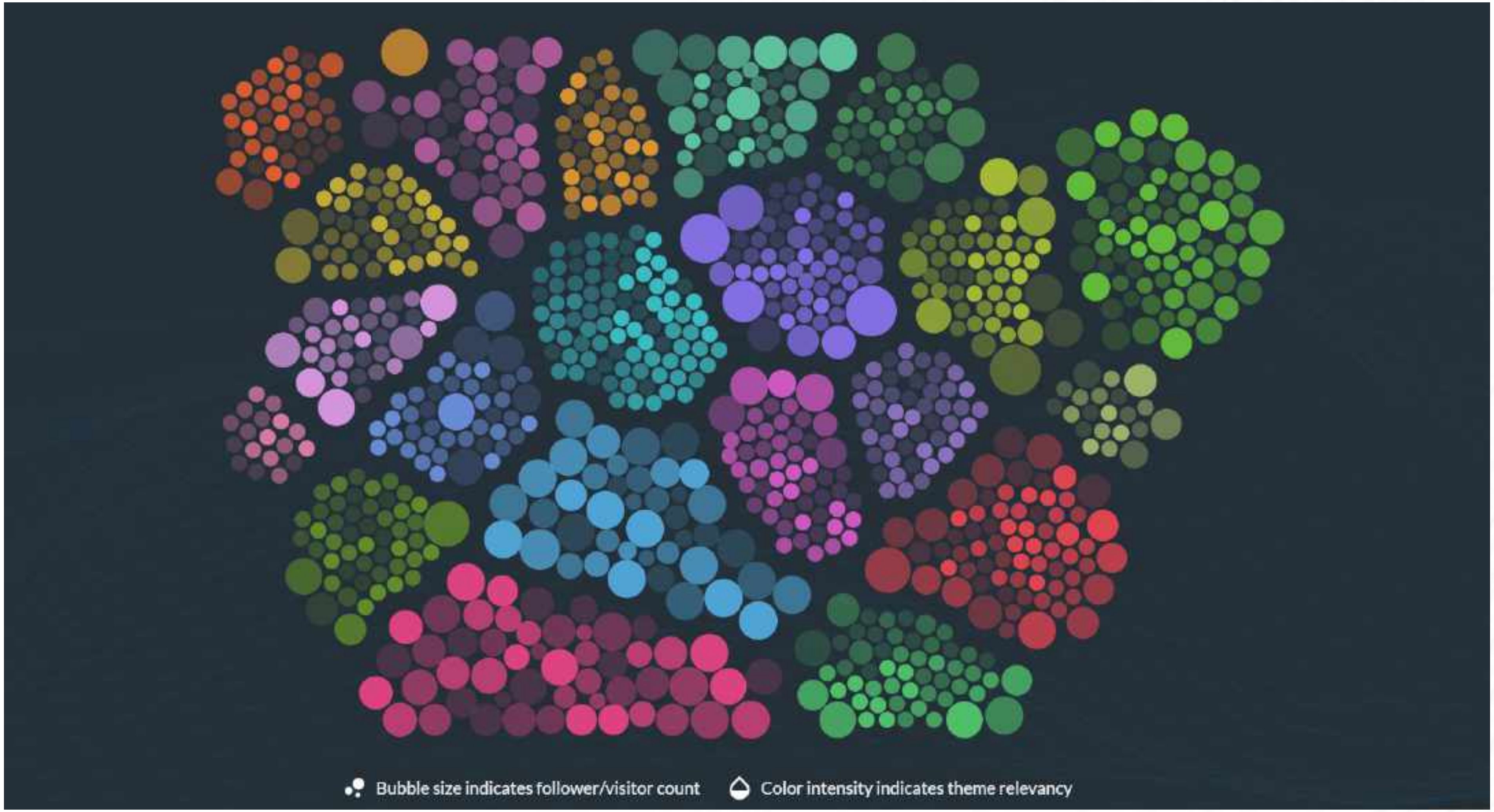
	Net Sentiment	Passion Intensity	Number of mentions
BARCLAYS	7	47	215,860
Nationwide	57	27	161,746
monzo	49	71	63,683
NatWest	18	44	61,975
STARLING BANK	59	58	53,500

For social analytics methodology and full set of scores for all brands tracked, please refer to the Appendix

ALLIGATOR Bva BDRC

Starling: key themes

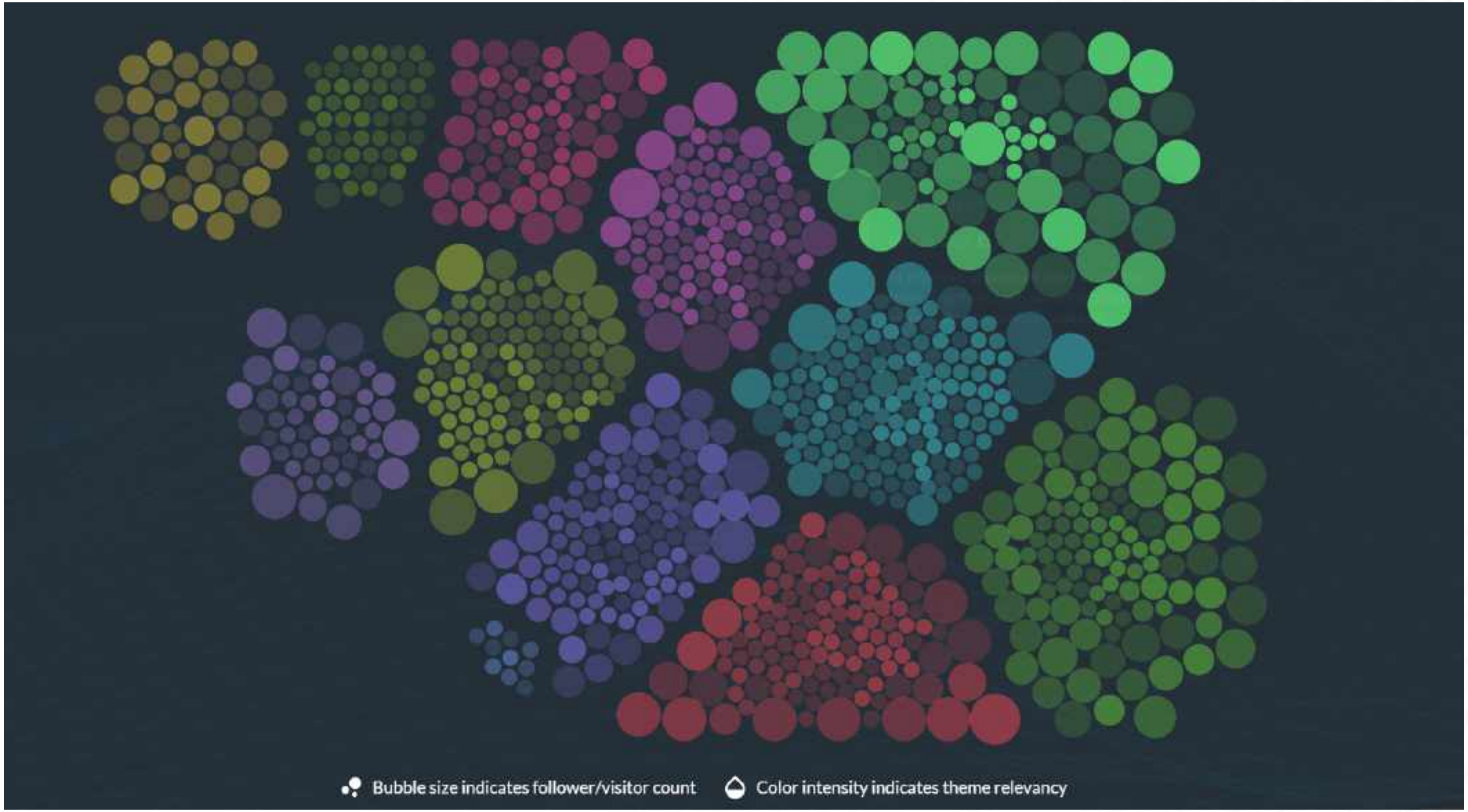
Conversation about Starling has balanced recognition of the brand's contribution to shaping the future of banking, with fundamental product features such as its stance on transaction fees or the provision of CBILS – the latter credited with contributing to a 'transformational period' for the bank.



- Transaction fees
- Fintech
- Account, credit checks and unauthorized transactions
- Other challenger banks (Monzo, Revolut)
- Coronavirus Business Interruption Loan Scheme (CBILS)
- Opening an account
- Mobile app
- Shaping Fintech/conference

Barclays: key themes

Many of the big banks benefited from a halo effect as a result of the launch of consumer and business coronavirus support measures, and Barclays is no exception, however fervent discussion about technical issues (particularly the app) dilutes overall sentiment



- Dividends to shareholders and Bounce Back scheme
- Home owner loans
- Business support from Barclays during covid-19
- Customer service
- Barclays' dedication to help customers during covid-19
- Former Barclays' bosses cleared of fraud
- Mobile app and queries
- Online transactions and technical issues

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 1,759 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:

- 15,916 posts for the transport sector
- 11,795 posts from the leisure sector
- 7870 posts from the hospitality sector
- 14,931 posts from the financial sector

Methodology

Social media analytics – Brand Analysis

Social media content was analysed from the time periods of 23rd March 2020– 10th August 2020, with AI theme discovery Feb 17th-Aug 17th

The data depicts the following:

- Net sentiment
- Passion Intensity
- Number of mentions
- Number of posts
- AI theme discovery

Content analysed: The net sentiment, passion intensity, number of mentions and number of posts are social media conversations that are taking place on earned channels. All AI theme discovery uses ALL content from both earned, partnered and owned channels.

Language coverage: No geographical restriction is applied but the conversation is filtered on the English language only (exception of AI theme discovery). All other languages are not present in the main analysis.

Net Sentiment

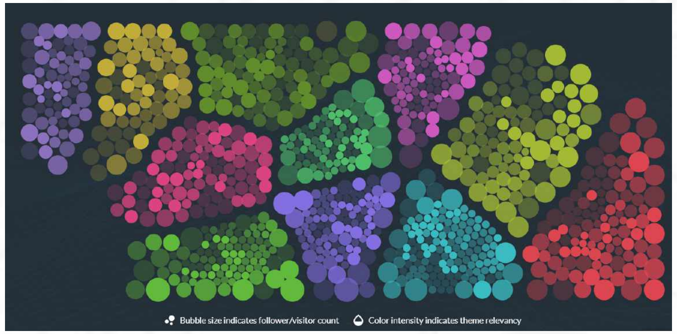
How positive the online discussions are. A Net Sentiment score of +100 means that all opinions of the brand are positive while a score of -100 means that all opinions of the brand are negative. Net Sentiment deducts the proportion of negative discussions from the proportion of positive discussions

Passion Intensity

How passionate are social media users towards each brand. How emotionally charged the customers’ feelings are, whether positive or negative. For instance, words such as awesome, delight and exceptional, are considered as strong positive emotions while words such as adequate, appreciate and appropriate, are considered as weak positive emotions.

AI Theme Discovery:

The first auto-discovery insights tool in the social listening space for discovering themes associated with a given brand. This is based on all content in all geographies. It was analysed over a period of the last 6 months.



Sentiment – Summary table – Brand Analysis

23rd March 2020– 10th August 2020

Banks | Media | Attractions and leisure | Hotels | Transport

	Net Sentiment	Passion Intensity	Number of mentions
Hampton Court Palace	98	100	21,766
Thatchers	90	20	8,417
Kew Gardens	86	60	48,049
Courtyard by Marriott	86	68	22,450
Sea Life London Aquarium	84	100	724
Crowne Plaza	82	72	16,613
JW Marriott	79	67	10,483
Novotel	76	65	20,470
Mercure	74	49	4,547
Hilton Garden Inn	73	62	15,821
Legoland Windsor	70	28	6,020
AC Hotels by Marriott	68	52	5,338
Heineken	62	56	86,650
English Heritage	60	82	35,008
Best Western	60	56	18,465
IHG	59	62	72,523
Starling	59	58	53,500
Manchester Airport	58	68	54,931
ibis	58	53	7,136
Nationwide	57	27	161,746
Kensington Palace	56	54	201,303
Premier Inn	55	69	15,100
Tower of London	55	75	63,951
Holiday Inn	54	66	92,601

	Net Sentiment	Passion Intensity	Number of mentions
Monzo	49	71	63,683
InterContinental	46	77	20,402
Emirates Airline	45	100	400,558
Hilton	41	72	169,746
DoubleTree by Hilton	40	54	17,505
National Trust	39	44	135,270
Marriott	32	54	167,541
Singapore Airlines	28	74	77,980
Holiday Inn Express	20	58	35,296
Etihad Airways	18	87	138,751
NatWest	18	44	61,975
Travelodge	15	60	39,715
Hampton by Hilton	15	0	12,578
Barclays	7	47	215,860
Virgin Atlantic Airlines	6	36	294,090
Qantas	6	49	149,002
Cathay Pacific	3	90	27,992
Gatwick Airport	1	44	148,438
EasyJet	-3	43	498,724
Heathrow Airport	-13	51	1,432,545
British Airways	-15	42	865,297
London City Airport	-17	88	18,837
Ryanair	-18	61	434,242
Chessington World of Adventures Resort	-48	48	14,044

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