

The UK During COVID-19 September 2020

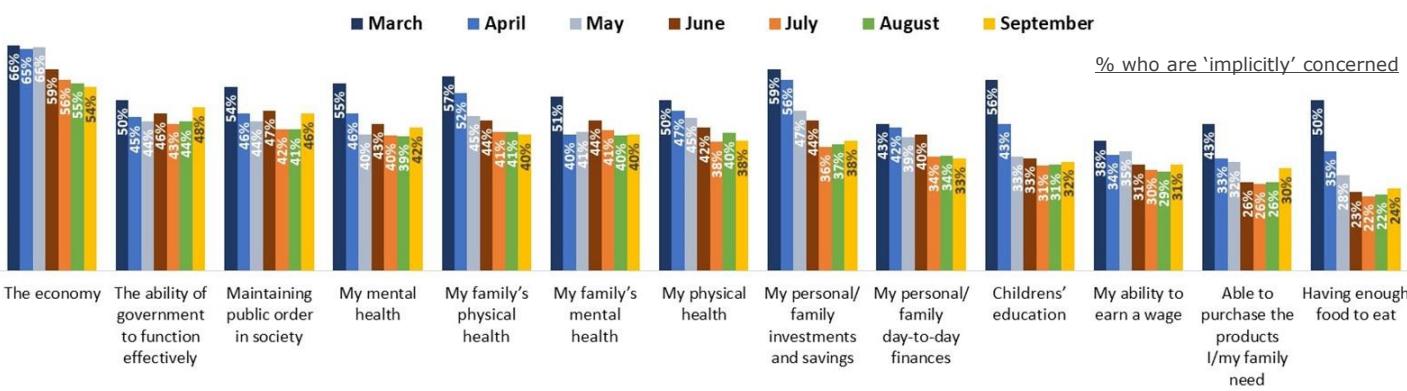
HIGHLIGHTS OF HOW THE UK IS FEELING, BEHAVING AND THINKING FROM OUR COVID TRACKER

PEOPLE SEEK EFFECTIVE UK GOVERNMENT LEADERSHIP

The uptick in recorded positive Covid-19 cases combined with a number of well publicized government mishaps on testing and policy u-turns has led to a greater desire for reassurance (Maintaining public order in society, +5 points) and clear leadership from the government (The ability of government to function effectively, +4 points). The next 3 months will be a real test for the UK government to connect with the public and provide clear and consistent leadership.

We see a slight increase in implicit concern for food and product availability, which although low, could point towards a return to over-buying food and essential items. Our 'Feel, Behave, Think' insights at the start of the Pandemic highlighted the challenges around combatting emotional urges via rational communication, meaning that shops should consider re-enforcing buying limits, rather than trying to tell people not to buy more than they need.

Our IAT capability uses reaction time to identify fast, instinctive choices, revealing which concerns evoke a 'system 1' or implicit emotional response in the brain, strongly influencing behaviour. We show the top ranked 'implicit' concerns below.



WE TOLERATE WAIT TIMES BUT EXPECT ITEMS TO BE IN STOCK

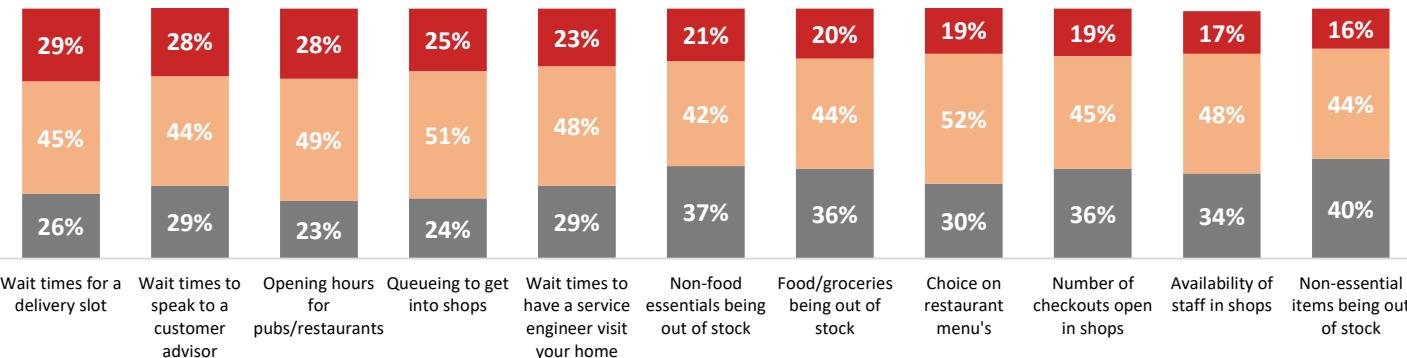
RESOLVING PRODUCT AVAILABILITY ISSUES AND MANAGING STAFFING LEVELS SHOULD BE A CORE FOCUS

To explore changing customer expectations, we looked at a number of elements of the customer experience. Delivery lead times and waiting to speak to an agent were the areas in which expectations have shifted the most – although this shouldn't be seen as an excuse to deliver poor experiences. Expectations around limited delivery capacity may result in customers starting to order early for Christmas, resulting in a need to plan ahead for an earlier peak.

We are becoming accustomed to queuing to enter shops, but are less tolerant of out of stocks, limited staff and checkout availability when in the shop – highlighting the areas that retailers should focus on to avoid the risk not meeting customer expectations, resulting in dissatisfied customers.

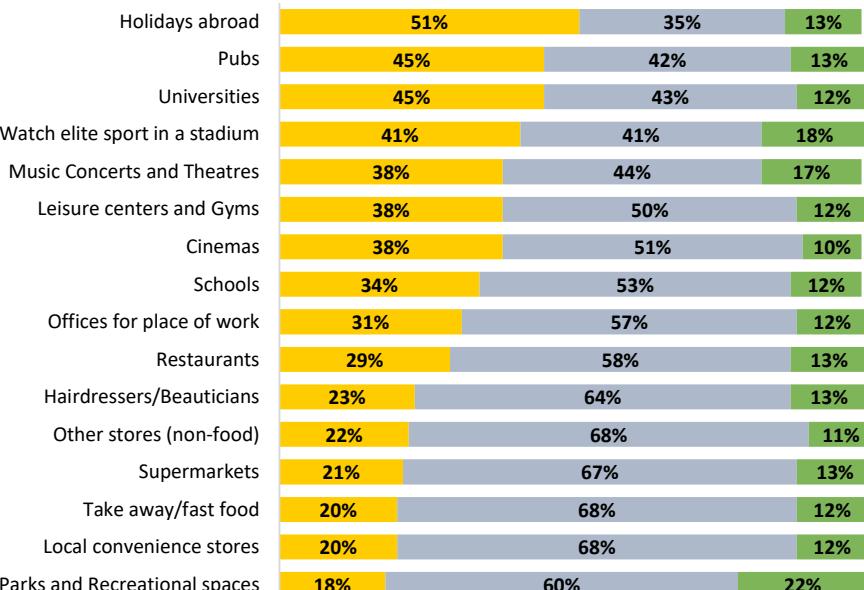
Please tell us which phrase best describes your expectations of the customer experience based on the impact of Covid-19?

■ The same as before the Pandemic ■ Slightly worse than before the Pandemic ■ Much worse than before the Pandemic



For each area, please tell us whether you think it should have more restrictions, keep restrictions at the level they are, or reduce restrictions

■ More restrictions ■ Keep as they are ■ Fewer restrictions



WHERE DO PEOPLE WANT MORE RESTRICTIONS?

For most areas people thought that the current level of restrictions were appropriate, indicating that wider public health is still a priority concern for many.

The areas where people think more restrictions should be imposed are for travel abroad, pubs and universities. Media coverage of returning holiday makers, students going to university and local clusters of Covid-19 outbreaks has heightened public awareness. Brands and companies that are not perceived as acting responsibly will face a public backlash and further media scrutiny.

The majority don't desire more restrictions on food shopping and take-aways, with most assuming they'll remain as they are.

We can see a real need for people to have access to parks and recreational spaces, with the lowest number of people wanting more restrictions imposed for this activity.

Results are taken from Maru's ongoing UK tracker of key elements related to how people are FEELING, BEHAVING, and THINKING during the COVID-19 pandemic. We speak to 1,000 nationally representative UK adults twice a week. For more information, please go to www.marureports.com/coronavirus, or contact your account team or info@marumatchbox.com.