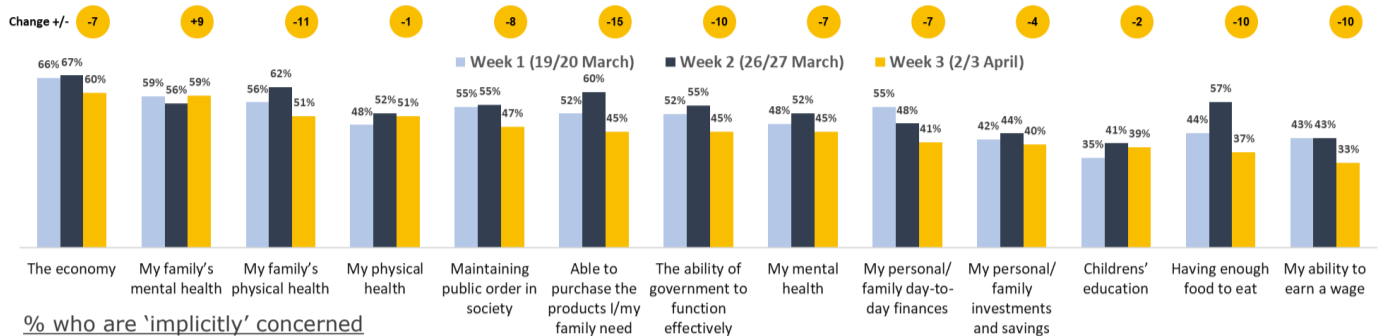


The UK During COVID-19 APRIL 2-3

Whilst some concerns have declined, the wellbeing of those aged under 35 has worsened due to a wider set of concerns

SOME FEELINGS OF CONCERN HAVE LESSENERD

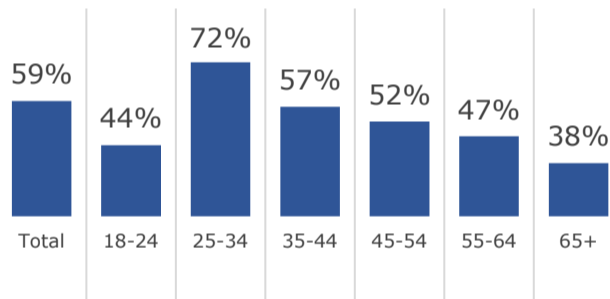
Our IAT capability uses reaction time to identify fast, instinctive choices, revealing which concerns evoke a System 1, emotional response from consumers, strongly influencing their behaviour. Week-on-week we observed a decrease in emotional concern for 'food' (-10) and 'product' (-15) availability as retailers recovered from the large initial spike in demand. Another area to fall back was concern around 'ability to earn a wage' (-10) and finances (-7), indicating state backed 'furlough' wage scheme is starting to take an effect: this is supported by two business surveys* last week which suggest that over 70% of small business and over half of larger business intended to use the scheme. However, the emotional concern for 'my family's mental health' has seen a 9-point increase, suggesting that the pandemic and lockdown is taking its toll mentally.



WHO IS FEELING THE MENTAL STRAIN?

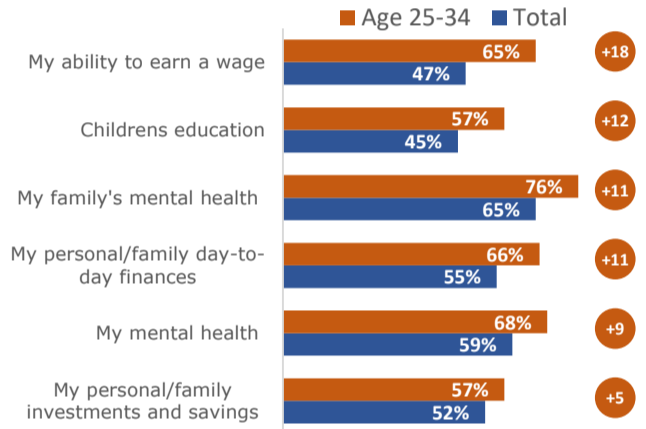
Looking at concern with the question 'My family's mental health' we can reveal that 25-44 year olds are suffering the most through this crisis with 72% of all 25-34 year old's emotionally concerned with family mental health.

This is the number one concern for 25-34 year olds, even ahead of 'The economy', which is highest for every other age group.



WHAT ARE THEIR CONCERNS?

WHAT CONCERNS DO 25-34 YEAR OLDS HAVE?



Analysis of concerns for 25-34 year olds identifies an array of concerns, but the greatest difference being for 'ability to earn a wage' which contrasts starkly to the nation as a whole, followed by children's education.

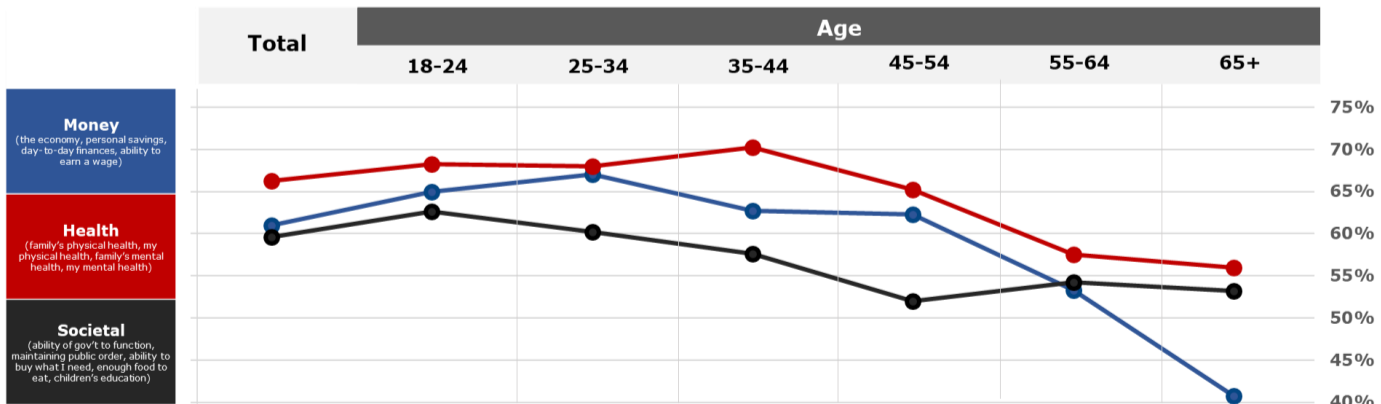
The lockdown is clearly having a huge impact on this group, even if their health is not a major concern.

AGE GROUP COMPARISON: AGGREGATED CONCERNS

FOR 18-34 (PARTICULARLY 25-34) MONEY IS ALMOST AS IMPORTANT AS HEALTH

Whilst the over 55's have fewer concerns, particularly financial, it is the squeezed younger working population, aged under 35, who are really feeling the financial strain, with 25-34 year old's seeing money issues as concerning as health. This age group is typically on lower salaries, facing the prospect of being furloughed, have young children at home and have large mortgages or rent - this wider set of concerns around the pandemic is impacting their mental wellbeing.

AVERAGE CONCERN LEVEL: MONEY, HEALTH, SOCIETAL CONCERNS



"Money": the economy, personal savings, day-to-day finances, ability to earn a wage

"Health": family's physical health, my physical health, family's mental health, my mental health

"Societal": ability of government to function effectively, maintaining public order, ability to buy what I need, availability of enough food to eat, children's education

WHAT'S IN THE DATA?

Results are taken from Maru's ongoing FEEL, BEHAVE, THINK Covid-19 UK tracker. We speak to 1,000 nationally representative UK adults per week to understand:

- How changing concerns and emotions are impacting decision making
- How behaviours are changing as the crisis continues
- How brands can best respond during these unprecedented times

For more information, please go to www.marureports.com/coronavirus, or contact you account team at info@marumatchbox.com.

*Financial Times (ft.com) 2nd April 2020

All data from 2-3 April 2020: 1034 UK nationally representative adults (Maru/Blue UK)

This Maru/Reports initiative is brought to you in partnership by Maru/Matchbox and Maru/Blue.

