

The UK During COVID-19 APRIL 16/17

We are less concerned than at the start of the lockdown period, but when people eventually socialize again, the food and drink sector will need careful planning.

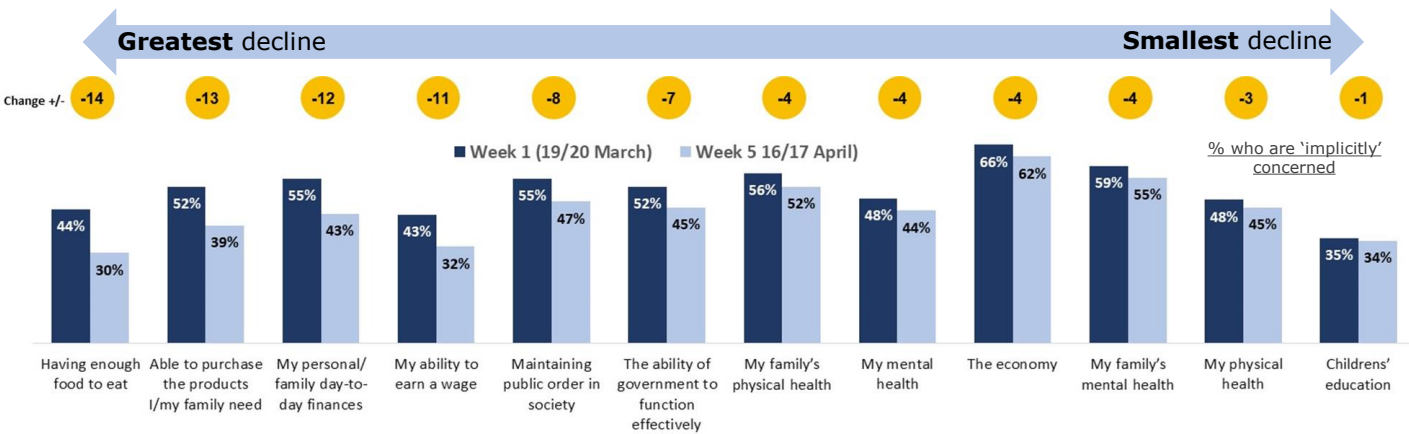
HOW HAS EMOTIONAL CONCERN CHANGED IN A MONTH?

Our in-house 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. Looking back to the first week of our tracker on 19/20 March, and comparing to 16/17 April, we have revealed how implicit, emotional concerns have changed. Greatest declines have been observed for:

Food and product availability: Thankfully, we have seen the back of the initial hoarding of food and products which led to bare shelves and a self-perpetuating 'panic buying' vicious circle.

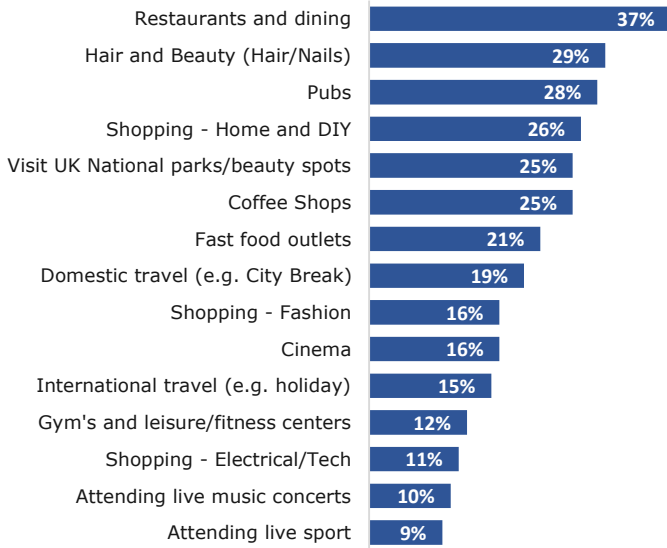
Personal finances and wages: It is clear the governments 'Furlough' scheme is being used by the majority of employers as an alternative means to laying off workers, meaning emotional concern for this issue has decreased by -11 points, despite 'the economy' still being the greatest emotional concern to people.

Public order and government effectiveness: Generally people are less concerned about societal order and the effectiveness of government than 4 weeks ago. However, issues around mental and physical health, as well as education, have declined the least indicating these are areas that may still be an issue in the future for government to tackle.



WHEN LOCKDOWN ENDS, WHAT WILL WE DO SOCIALLY?

Which areas participate in when lockdown is lifted?



We asked people to rank their top 3 areas to participate in when lockdown finally ends, and the results show we miss the social aspect of eating out and going to the pub, ahead of shopping and travel.



Dining out was the most popular with 37% of people saying they would do this, along with visiting pubs (29%).



Hairdressers and beauty shops can expect to be busy with 29% saying they would visit these, increasing to 43% for women.



National parks and beauty spots can expect a lot of interest when the restrictions are withdrawn with 1/4 saying they would visit them.



People are thinking about their homes with more people intending to shop 'Home and DIY' (26%) versus fashion (16%) and electrical (11%) retailing.

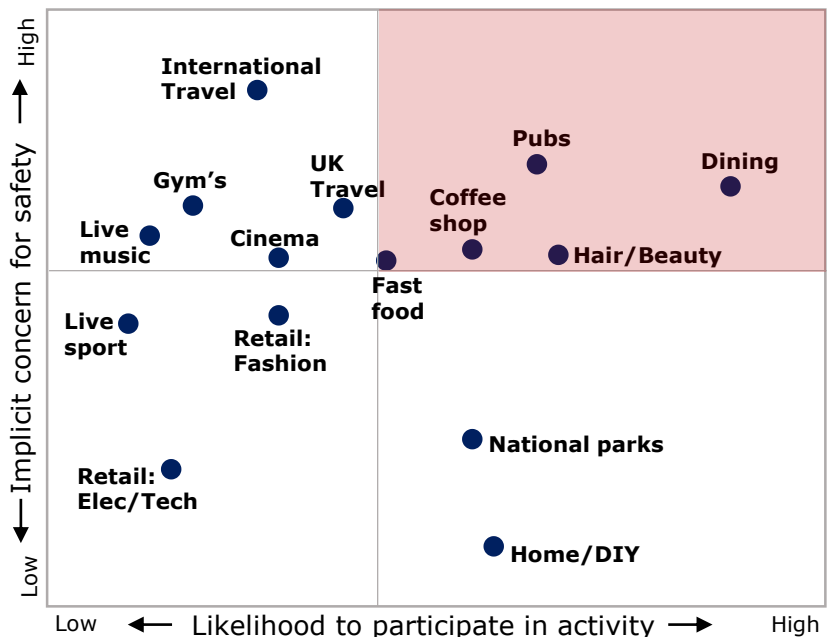
FOOD AND DRINK IS MISSED, BUT THERE ARE SAFETY FEARS

To drive insight we mapped likelihood of participating when lockdown ends, against implicit concern over safety, using our IAT (Implicit Association Test) methodology.

This has revealed (red area highlighted) that whilst we miss socially eating and drinking, we do have a strong implicit fear of catching or transmitting the Covid-19 virus in these settings - which includes Hair and Beauty outlets.

When re-engaging with customers these sectors will need to provide strong evidence of their safety measures, and our research has suggested the following action will be most emotionally and rationally reassuring for customers:

- Observe physical distancing e.g. 2m apart
- Restrict numbers of people in a space
- Measures to protect staff (screens/gloves)
- Provision of hand sanitizer
- Enhanced deep and frequent cleaning of facilities



Results are taken from Maru's ongoing, UK tracker of key elements related to how consumers are FEEL, BEHAVE, and THINK during the COVID-19 pandemic. Week 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.