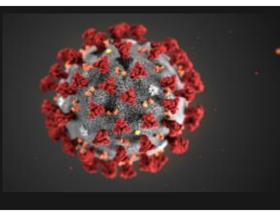


The UK During COVID-19 MAY 7-8

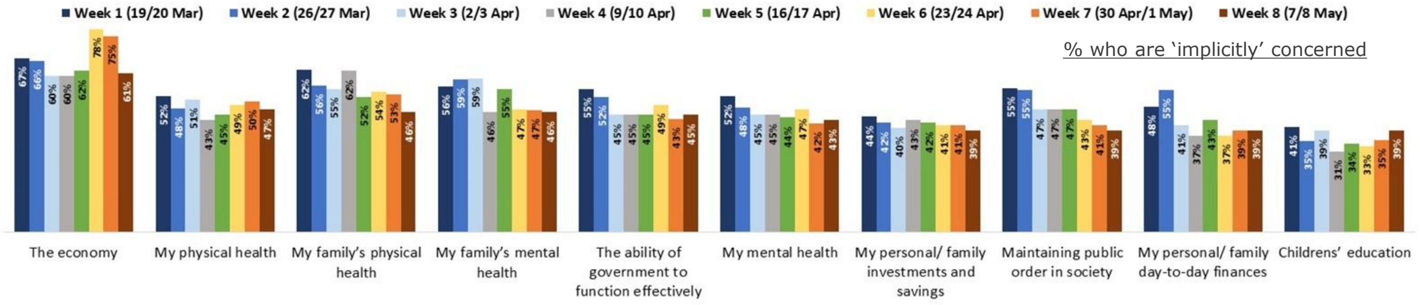
WEEKLY HIGHLIGHTS OF HOW THE UK IS FEELING, BEHAVING AND THINKING FROM OUR COVID TRACKER

ECONOMIC CONCERN DECLINES BUT EDUCATION INCREASES

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. We've now been tracking emotional response to concerns for 8 weeks and have shown the top ranked 'Implicit' concerns below.

Whilst the economy decreased in implicit concern, it still remains the highest area, and concern about household finances has remained unchanged, indicating people are still worried about money, and within this infographic we look at who has the greatest money concerns.

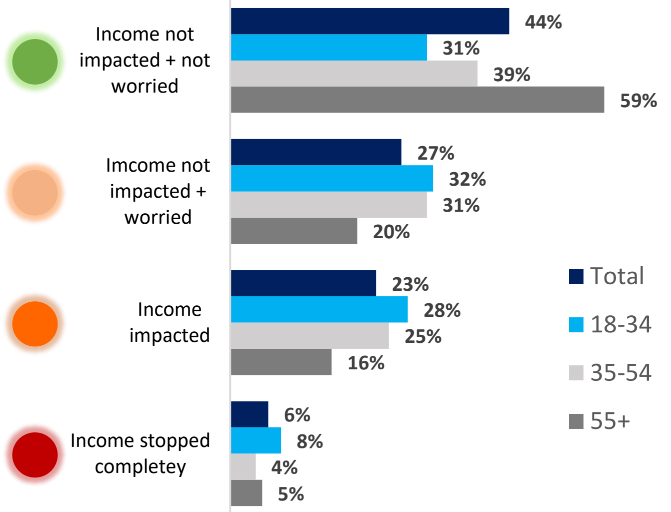
We've also observed a third consecutive increase in concern for children's education, pointing towards this issue growing in scale the longer schools remain closed, which also has an income impact on some who need to provide childcare.



56% HAVE OR FEAR AN INCOME HIT

IMPACT IS GREATEST FOR UNDER 35s

36% of those aged under 35 years have either had their income impacted or stopped, increasing to 68% if include those who are not yet impacted - but say they are worried. Even at a total level 56% are either impacted or worried they will be. This is likely to influence consumer spending and slow down any likelihood of a quick 'bounceback' recovery.



UNDER 35s ARE STRUGGLING

ON A RANGE OF MEASURES LIFE IS TOUGH

Below we have looked at 4 indicators to assess the impact on under 35s. For every measure those aged under 35 are worst hit, being much more likely to be furloughed, concerned financially and have a negative attitude to the impact of lockdown.

	Total	18-34
Furloughed by employer	38%	50%
Worried about paying bills	46%	65%
Think we should stop lockdown now	29%	46%
Think health benefits not worth economic damage	39%	55%

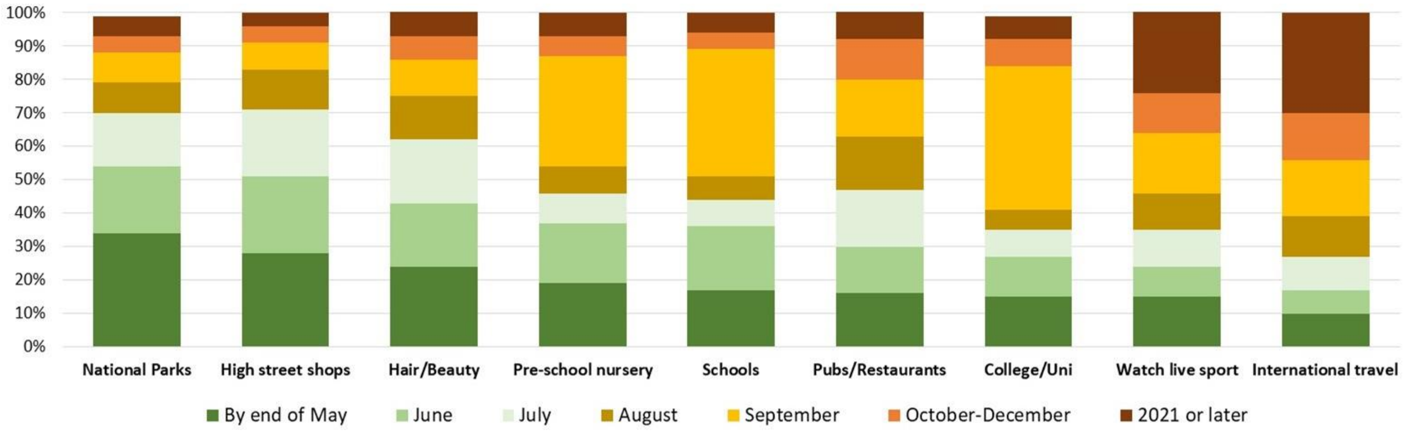
WHEN DO PEOPLE WANT LOCKDOWN TO END – BY SECTOR

WE WANT TO VISIT OPEN SPACES AND HIGH STREETS FIRST. A DESIRE FOR THE YOUNGEST CHILDREN TO RETURN FIRST

We asked the UK when they thought each of the following areas should be re-opened to the public in order to better understand their priorities. This supports our earlier published research that open spaces are perceived as much safer and easier to distance from others. People would also like some high street normality with shops and hair/beauty outlets reopening.

When looking at children the earliest desire to re-open is for pre-school nurseries, followed by schools, then universities. It appears the younger the child the more people want places to re-open. However, for all, the greatest expectation was that normality would be achieved by September – when the usual new school year starts.

The last activities we expect to resume are watching live sport and international travel, where around a quarter expect this to be delayed until 2021 or later.



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.